Group IT

User Manual

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Group_IT_US

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[website_url]

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Page: http://localhost/HelpConsole2010/Group_IT_US/_temp_PublishPDF/welcome.htm could not be added

**

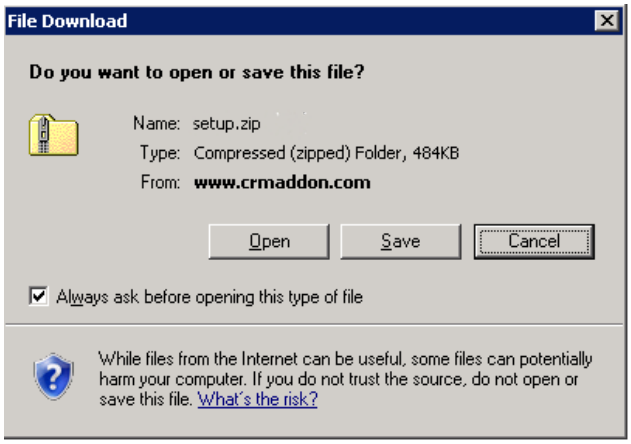
Installation

You can download the setup of your addon here, but first you need to register on our website or login with your current login details on the 'My Account' page.

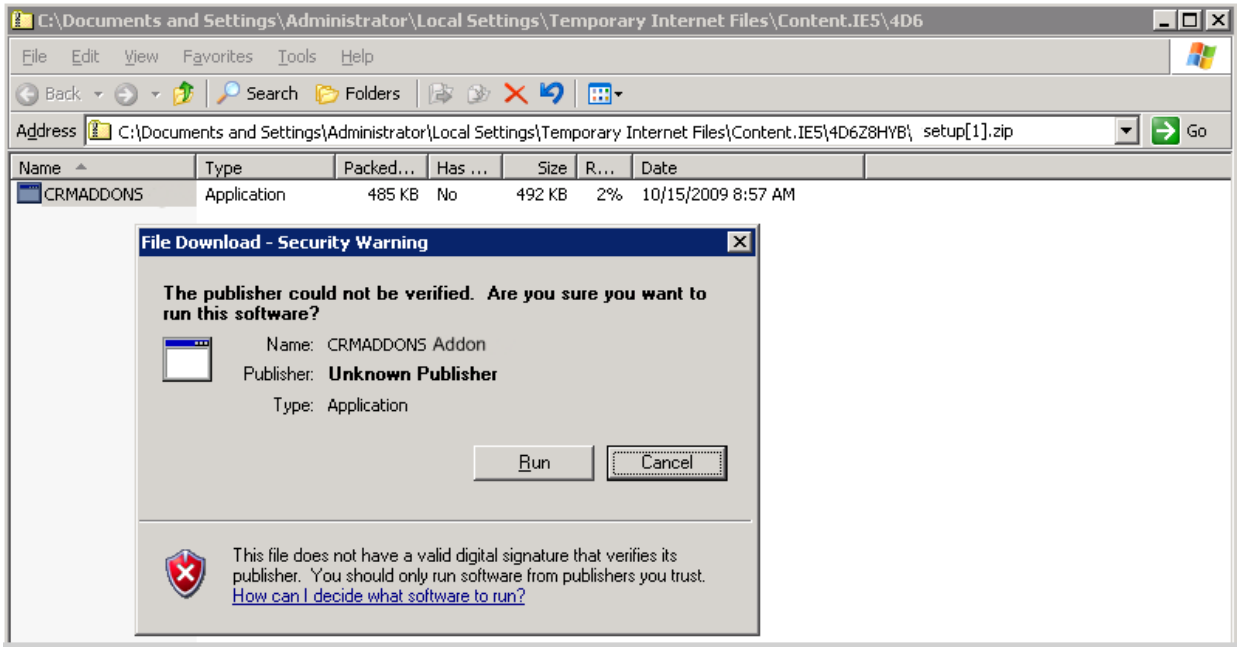
www.crmaddon.com/downloads

ATTENTION
ACT! and all other ACT! dependent processes must be closed

You can select whether to open or save the file.
If you select *'Save'* a ZIP file be saved on your computer. This ZIP - file can be saved on a removable disk (USB stick) and then you can install the addon on computers which do not have access to the internet.

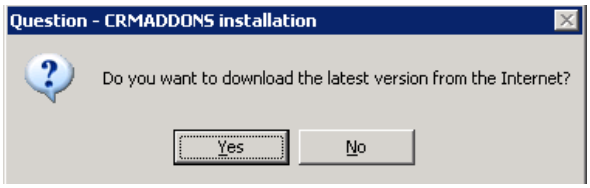

File Download
Do you want to open or save this file?
Name: setup.zip
Type: Compressed (zipped) Folder, 484KB
From: www.crmaddon.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Click on the file and then on *'Run'*


C:\Documents and Settings\Administrator\Local Settings\Temporary Internet Files\Content.IE5\4D6
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Documents and Settings\Administrator\Local Settings\Temporary Internet Files\Content.IE5\4D6Z8HYB\ setup[1].zip
Go
Name Type Packed... Has ... Size R... Date
CRMADDONS Application 485 KB No 492 KB 2% 10/15/2009 8:57 AM
File Download - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: CRMADDONS Addon
Publisher: Unknown Publisher
Type: Application
Run
Cancel
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust.
How can I decide what software to run?

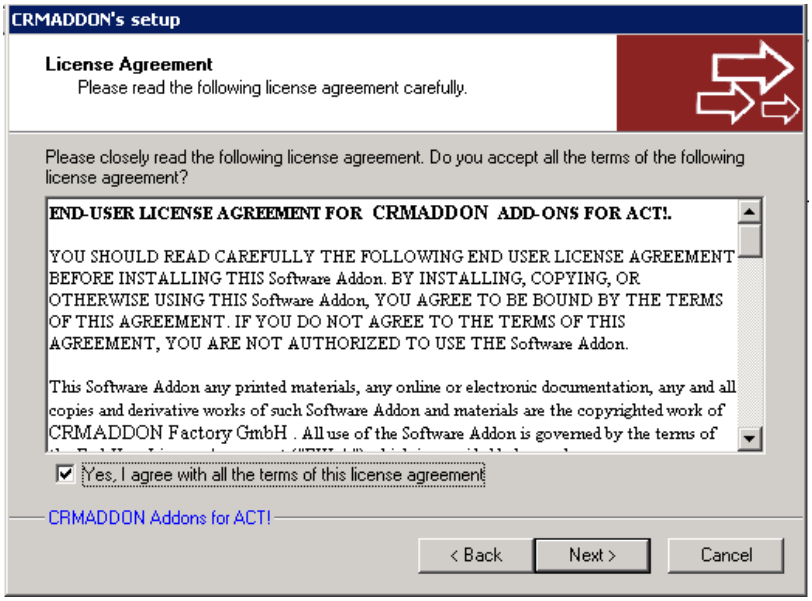
Click on *'Yes'* if you want to install the addon

**

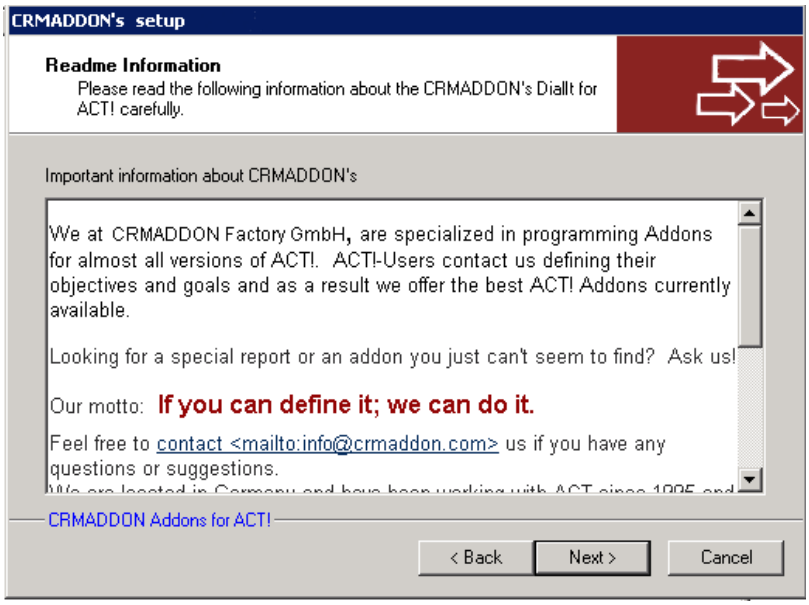


On the following PopUps click on *'Next'*

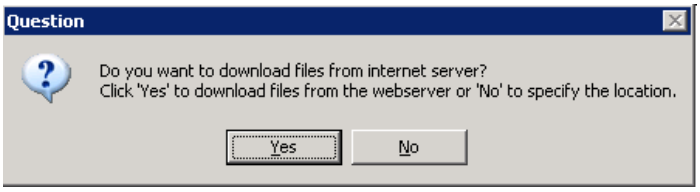
CRMADDON's setup
Welcome to the Installation Wizard
Welcome to the CRMADDON's Setup program. This program will install CRMADDON's Setup on your computer.
It is strongly recommended that you exit all Windows programs before running this Setup program. Click Cancel to quit Setup and close any programs you have running. Click Next to continue with the Setup program.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
CRMADDON Factory Installation Wizard
< Back
Next >
Cancel


CRMADDON's setup
License Agreement
Please read the following license agreement carefully.
Please closely read the following license agreement. Do you accept all the terms of the following license agreement?
END-USER LICENSE AGREEMENT FOR CRMADDON ADD-ONS FOR ACT!.
YOU SHOULD READ CAREFULLY THE FOLLOWING END USER LICENSE AGREEMENT BEFORE INSTALLING THIS Software Addon. BY INSTALLING, COPYING, OR OTHERWISE USING THIS Software Addon, YOU AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THIS AGREEMENT, YOU ARE NOT AUTHORIZED TO USE THE Software Addon.
This Software Addon any printed materials, any online or electronic documentation, any and all copies and derivative works of such Software Addon and materials are the copyrighted work of CRMADDON Factory GmbH . All use of the Software Addon is governed by the terms of
Yes, I agree with all the terms of this license agreement
CRMADDON Addons for ACT!
< Back
Next >
Cancel

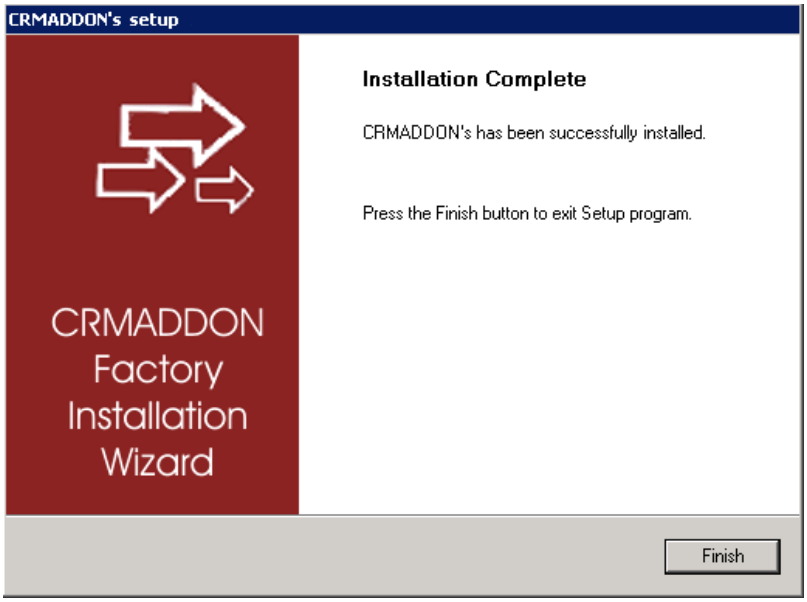
**


CRMADDON's setup
Readme Information
Please read the following information about the CRMADDON's Diallt for ACT! carefully.
Important information about CRMADDON's
We at CRMADDON Factory GmbH, are specialized in programming Addons for almost all versions of ACT!. ACT!-Users contact us defining their objectives and goals and as a result we offer the best ACT! Addons currently available.
Looking for a special report or an addon you just can't seem to find? Ask us!
Our motto: If you can define it; we can do it.
Feel free to contact <mailto:info@crmaddon.com> us if you have any questions or suggestions.
CRMADDON Addons for ACT!
< Back
Next >
Cancel

Click on *'Yes'* if you want to download and install the addon


Question
Do you want to download files from internet server?
Click 'Yes' to download files from the webserver or 'No' to specify the location.
Yes
No

If the addon was installed completely you will see this PopUp



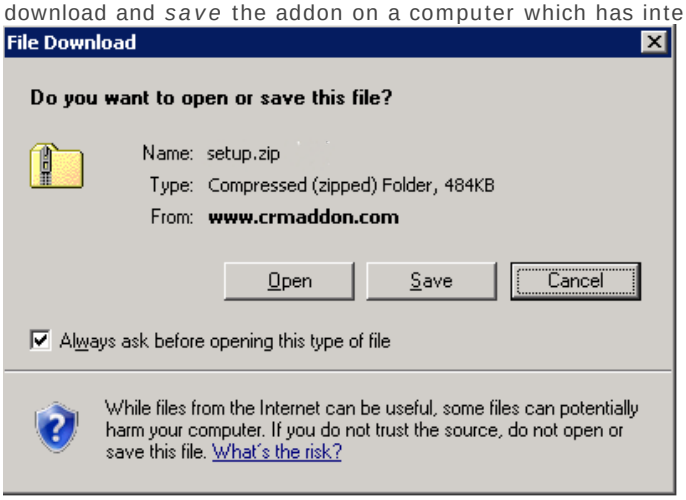
**

Installation without Internet

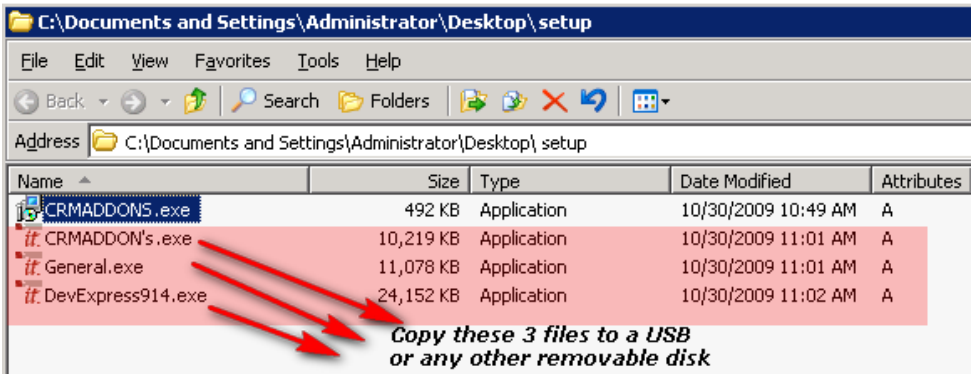
ATTENTION
PLEASE MAKE SURE THAT ON BOTH COMPUTERS THE SAME ACT! VERSIONS HAVE BEEN INSTALLED and that you have not installed any other addon of CRMADDON!

If you want to install the addon on a computer without internet connection, at first you need to follow these steps:

1. download and *save* the addon on a computer which has internet access


File Download
Do you want to open or save this file?
Name: setup.zip
Type: Compressed (zipped) Folder, 484KB
From: www.crmaddon.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

2. extract the .exe and run it once on this computer
   If you do not have any other CRMADDON addon installed there will be new files created in the directory of the .exe


C:\Documents and Settings\Administrator\Desktop\setup
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Documents and Settings\Administrator\Desktop\setup
Name Size Type Date Modified Attributes
CRMADDONS.exe 492 KB Application 10/30/2009 10:49 AM A
CRMADDON's.exe 10,219 KB Application 10/30/2009 11:01 AM A
General.exe 11,078 KB Application 10/30/2009 11:01 AM A
DevExpress914.exe 24,152 KB Application 10/30/2009 11:02 AM A
Copy these 3 files to a USB or any other removable disk

3. you need to copy the new created files on a USB or removable disk *(depending on the addon there can be 4 .exe!)*
   1. General.exe
   2. DevExpress.exe
   3. CRMADDON's.exe
4. move the USB / removable disk to the PC where you want to install it
5. install each packet in the stated order:
   1. General.exe
   2. DevExpress.exe
   3. CRMADDON's.exe
6. After you installed all packages the addon will run on your computer

Please note
to license the addon you need internet connection - without internet the registration is not possible

**

**

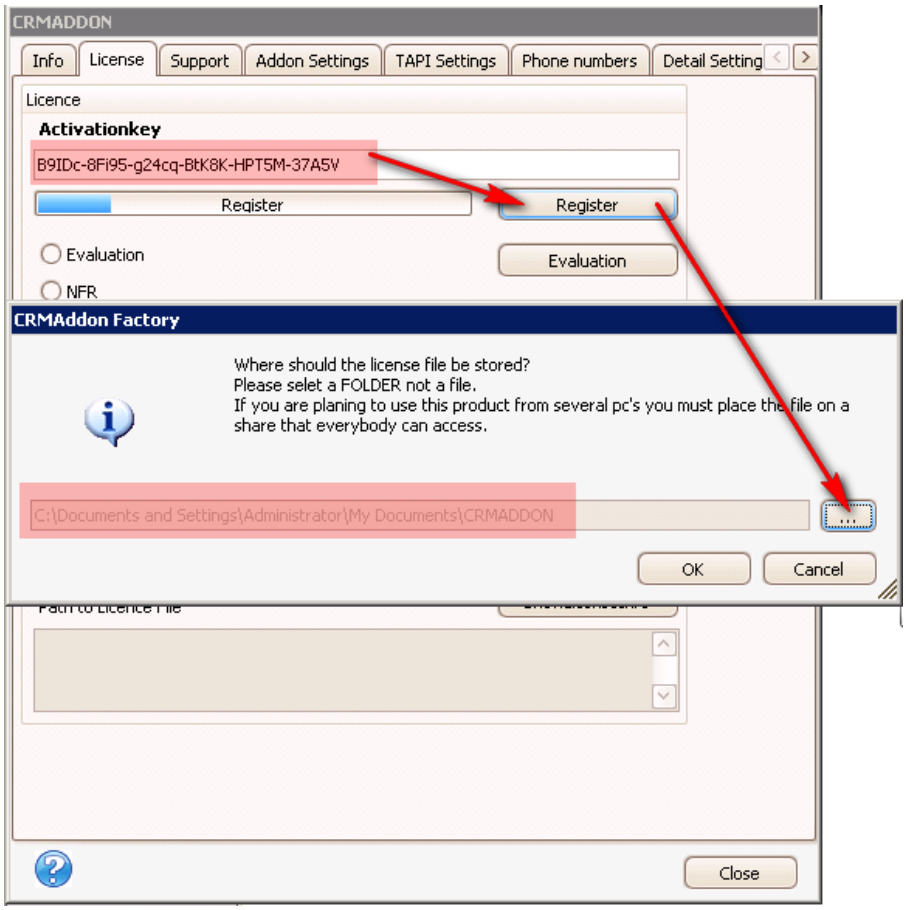
Licensing

You can test each of our addons 14 days - totally free!
The demo version has all the functions as the full version (except Import IT and Export IT).

At the end of the trial period you will be noticed that the evaluation version will expire soon.
If you do not buy the addon, you will not be able anymore to open the addon after the trial period.

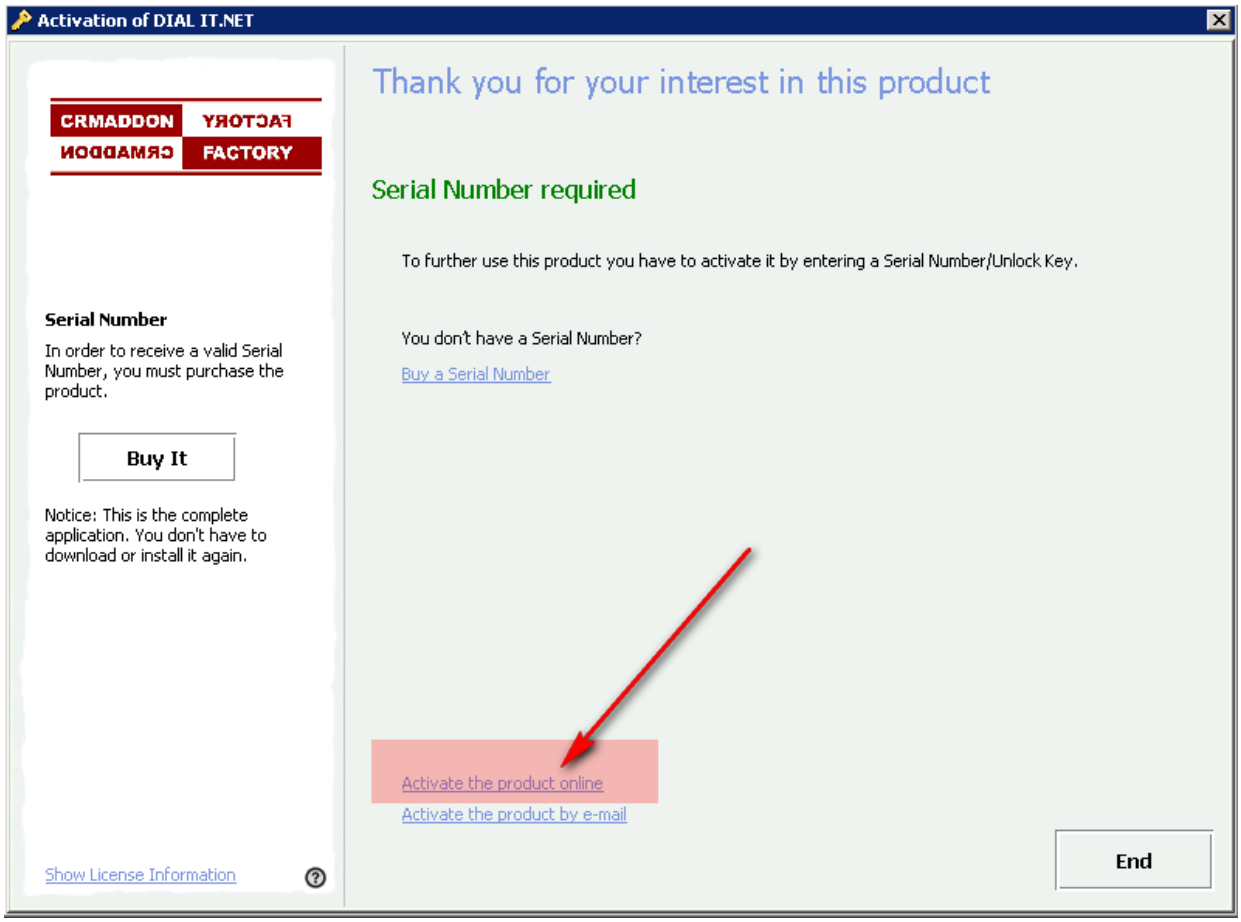
To use the addon with the full functionality you need to register it with a valid license key.

1. Open the Configuration of your addon
2. Click on the tap 'License'
3. Enter the license key (serial number) you received via an email
4. Click on 'Register' - *you do not need to select Evaluation/NFR/USB/License*
5. Define the directory where you want to save the license



6. A PopUp shows up, there you need to click on 'Activate the product online'

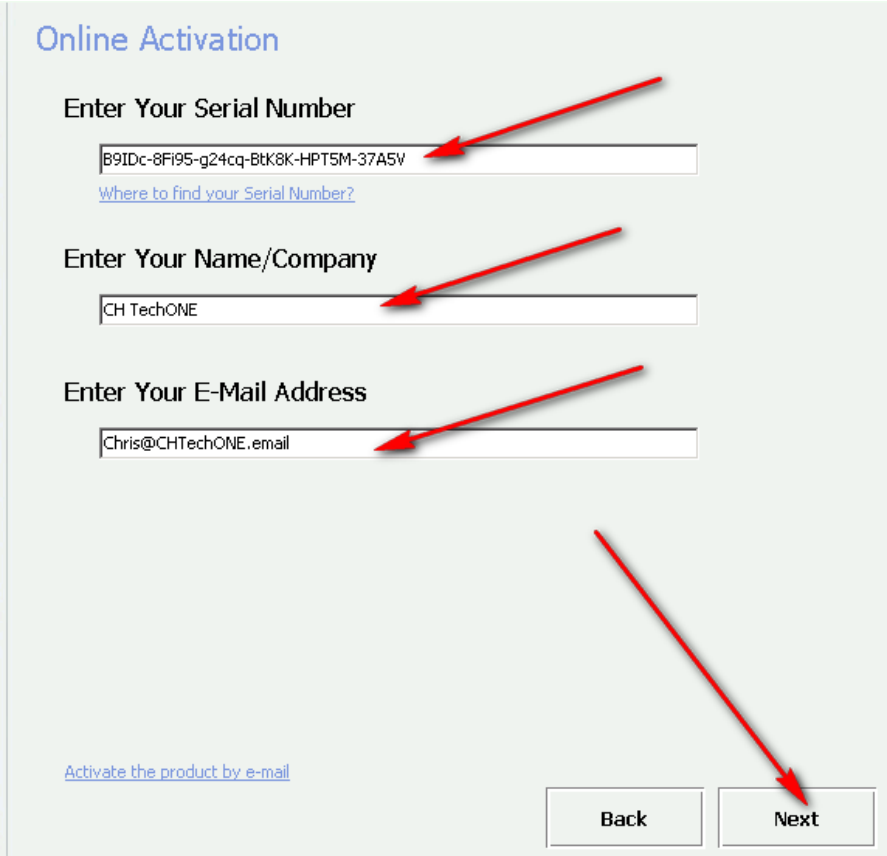
**


Activation of DIAL IT.NET
CRMADDON FACTORY
Thank you for your interest in this product
Serial Number required
To further use this product you have to activate it by entering a Serial Number/Unlock Key.
You don't have a Serial Number?
Buy a Serial Number
Serial Number
In order to receive a valid Serial Number, you must purchase the product.
Buy It
Notice: This is the complete application. You don't have to download or install it again.
Activate the product online
Activate the product by e-mail
Show License Information
End

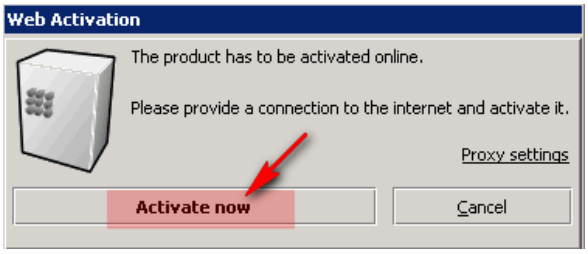
7. Enter the same license key as before and check if the details (name, company, email) are correct

8. Click on *'Next'*

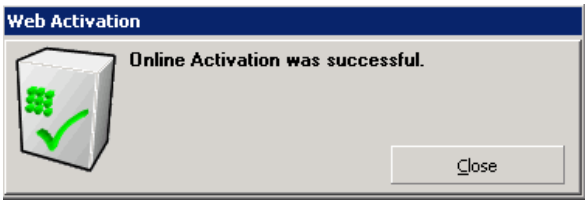
**



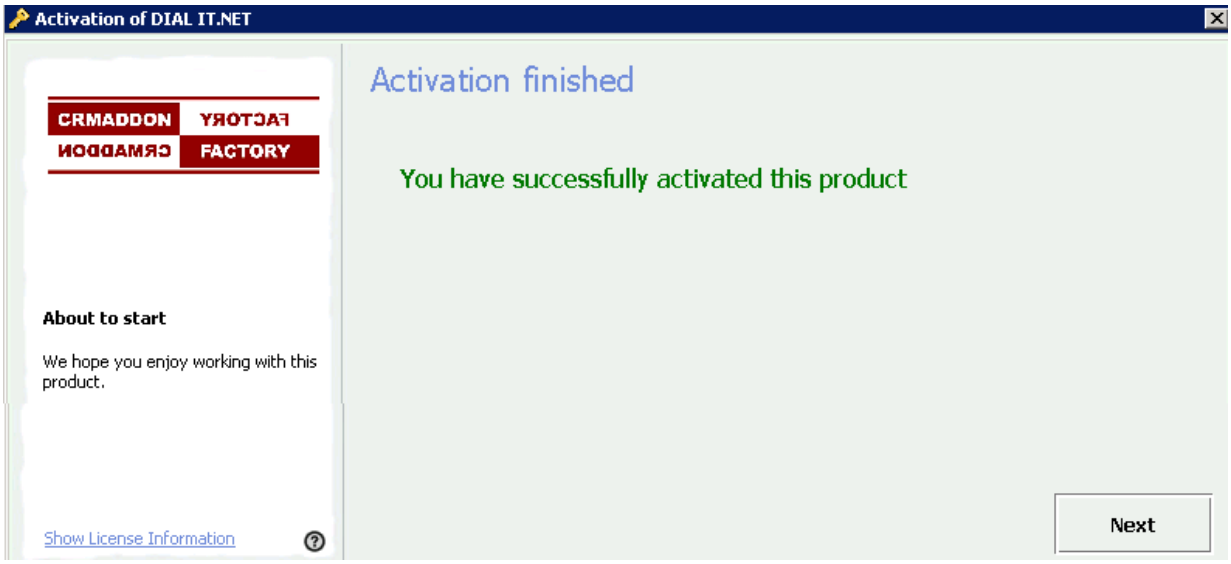
9. Click on 'Activate now'


Web Activation
The product has to be activated online.
Please provide a connection to the internet and activate it.
Proxy settings
Activate now
Cancel

10. If the activation/registration was successfull the following PopUp shows up



**



11. If you restart the Configuration you will see the the path to the license file, the addon and the version of the addon

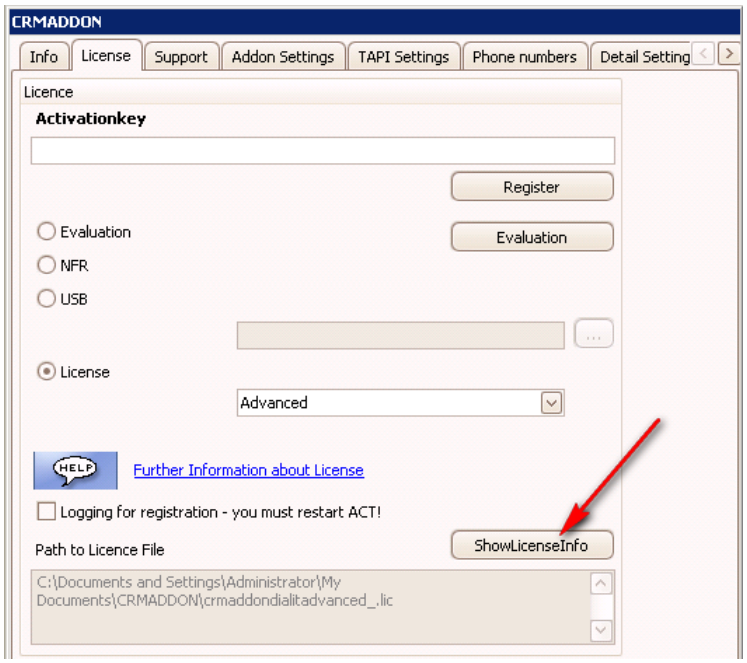
**

Upgrade License

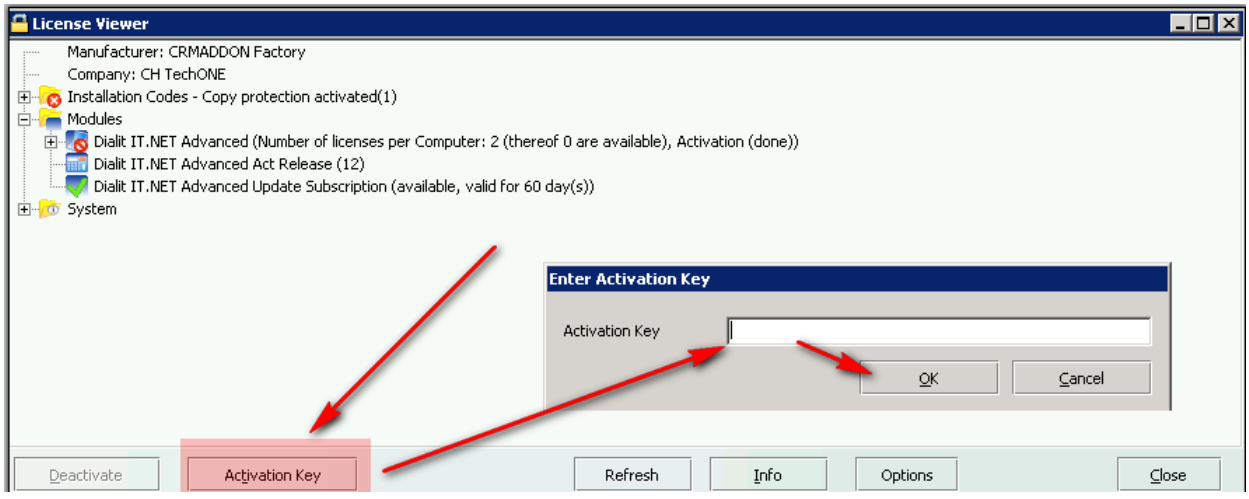
You recognize on the email you receive if it is an upgrade.
The email looks like this:

Upgrade (activationkey) for 3 more licenses	Shows you for how many licenses the upgrade is.
Import CRMADDON COUNTER Professional IT.NET	Which addon and version is it for?
CGFSX-8Fd95-u23cW-BtW8P-WPC5M-36A59	This shows the new license key

If you want to add additional licenses or to upgrade your addon, go to *'Show License Info'*.

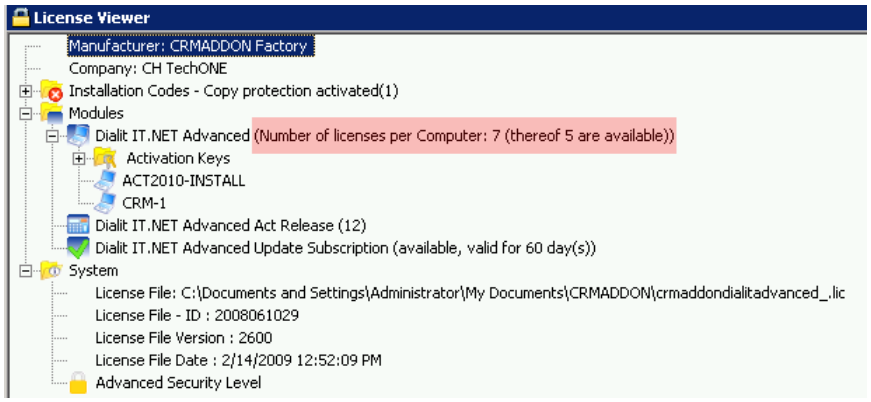


The following window appears.
There you need to click on 'Activation Key' and enter the activation key in the next window.



Afterwards you can see how many licenses you have and how many are still available.

**


License Viewer
Manufacturer: CRMADDON Factory
Company: CH TechONE
Installation Codes - Copy protection activated(1)
Modules
Dialit IT.NET Advanced (Number of licenses per Computer: 7 (thereof 5 are available))
Activation Keys
ACT2010-INSTALL
CRM-1
Dialit IT.NET Advanced Act Release (12)
Dialit IT.NET Advanced Update Subscription (available, valid for 60 day(s))
System
License File: C:\Documents and Settings\Administrator\My Documents\CRMADDON\crmaddondialitadvanced_.lic
License File - ID : 2008061029
License File Version : 2600
License File Date : 2/14/2009 12:52:09 PM
Advanced Security Level

**

System Requirements

ACT! 2006 (ACT!8) - ACT! 2009 (ACT!11), ACT! 2010, ACT! 2011, ACT! 2012

See also

Welcome
Installation
Licensing
Licensing
Examples how to use Group IT
Basic Functions
Configuration
Troubleshooting

**

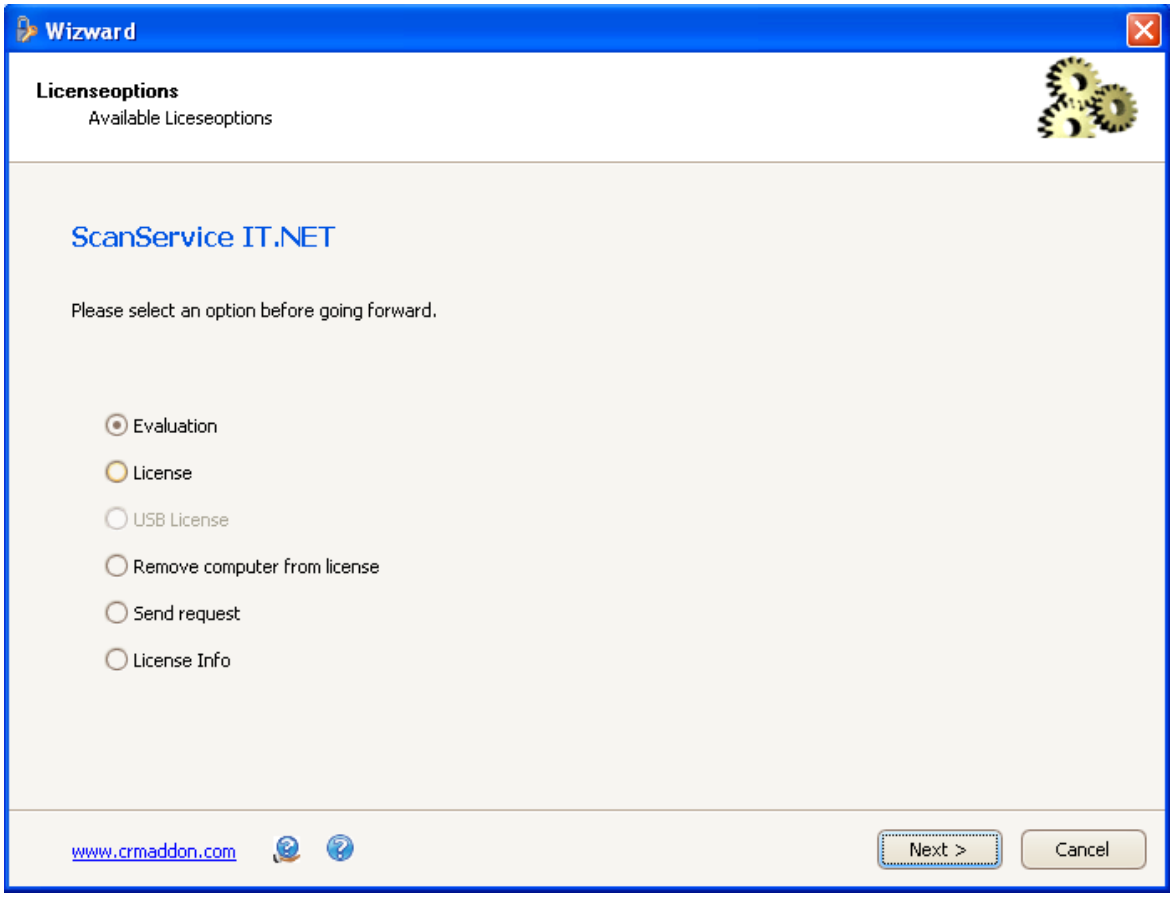
Licensing

When you install a new addon, it is required to be licensed. For testing purposes trial period is offered, so you are welcome to start with evaluation and then purchase a license if you decide to continue using the product.

Almost all addons offered by CRMAddon Factory have 14 days fully functional trial period. The following addons have some limitations:

1. Dial IT - 'Repair Phone Numbers' feature is not available
2. Import IT - Scrambles importing lists, i.e. does not allow to import information exactly as it appears in the source file, allows only 10 records importing. SQL connect is not possible as well
3. Scan IT allows scanning only 5 business cards per run
4. Export IT allows exporting only 10 records per run.

For licensing a convenient license wizard will open. You will need to follow its steps to evaluate or register the product with your license. It has the following look:



With this wizard you can start evaluation, register your license, remove computer from license, send request to our support team or get information about your license.

**

Evaluation

License

Remove computer from license

Send Request

License Info

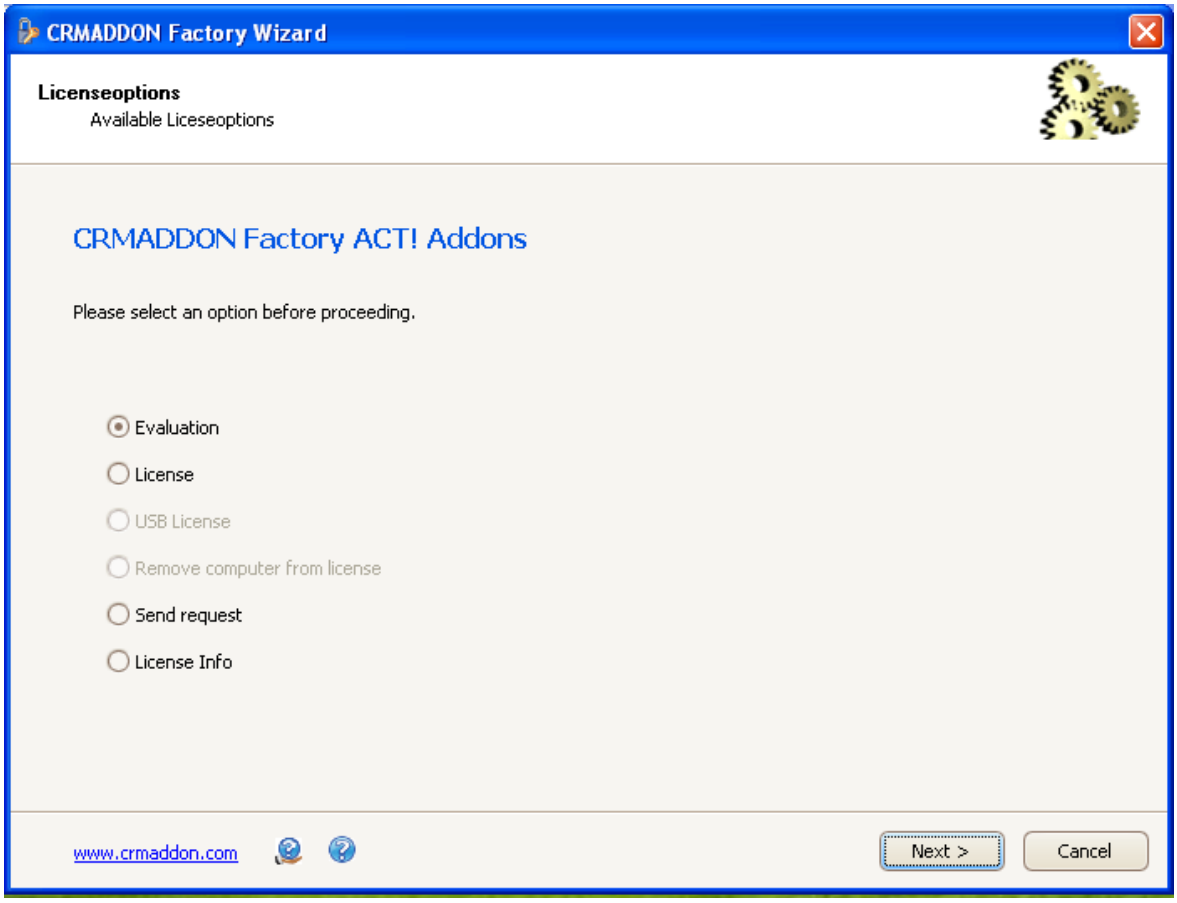
See also

- Welcome
- Installation
- Licensing
- System Requirements
- Examples how to use Group IT
- Basic Functions
- Configuration
- Troubleshooting

**

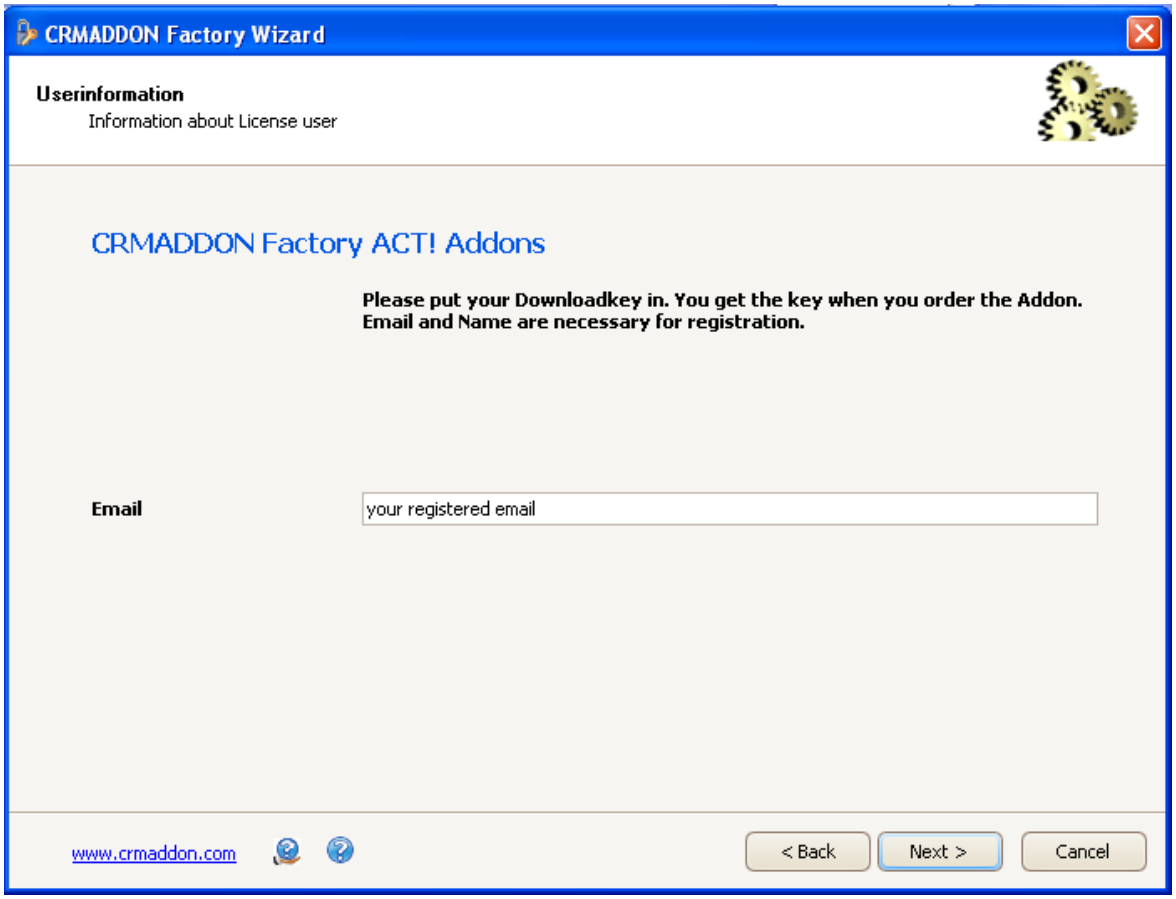
Evaluation

To start free trial period you need to select 'Evaluation' option on the Start Wizard page:



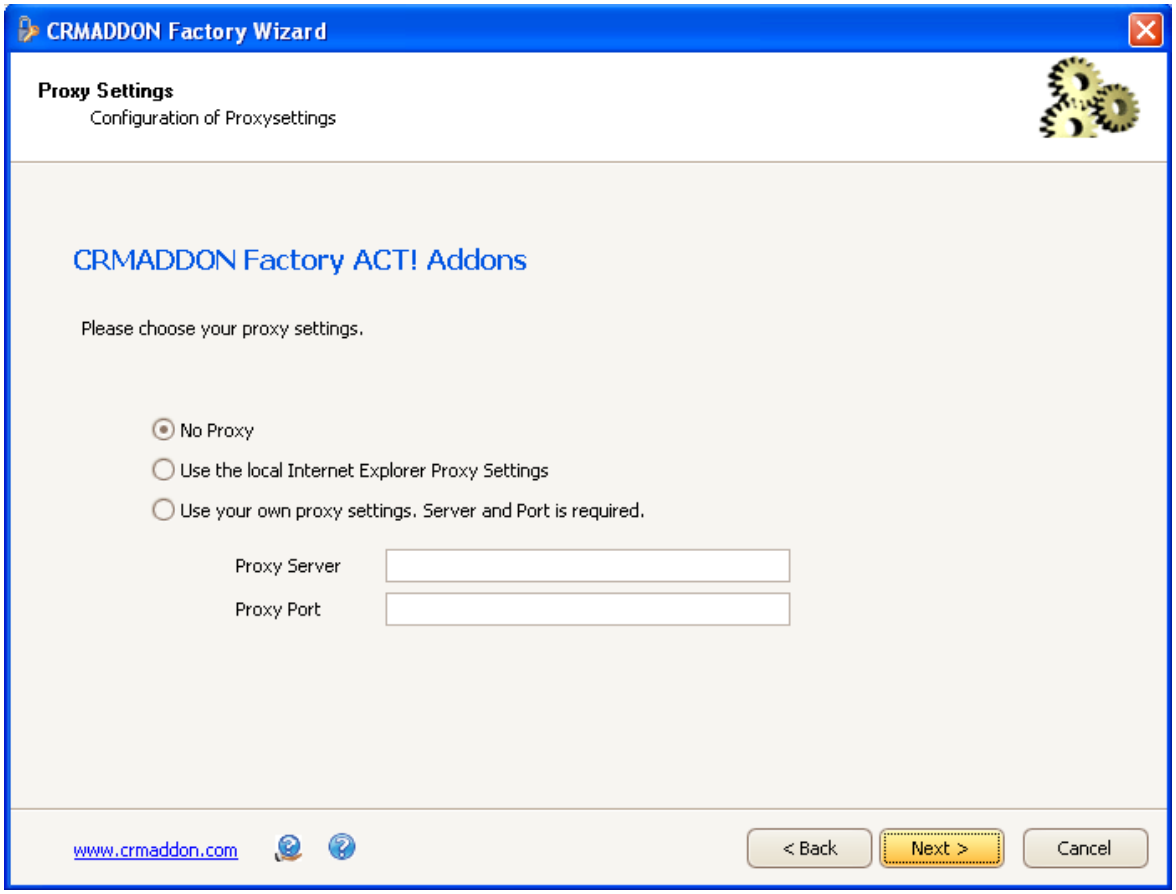
On the next form you will need to provide an email you registered the trial with:

**



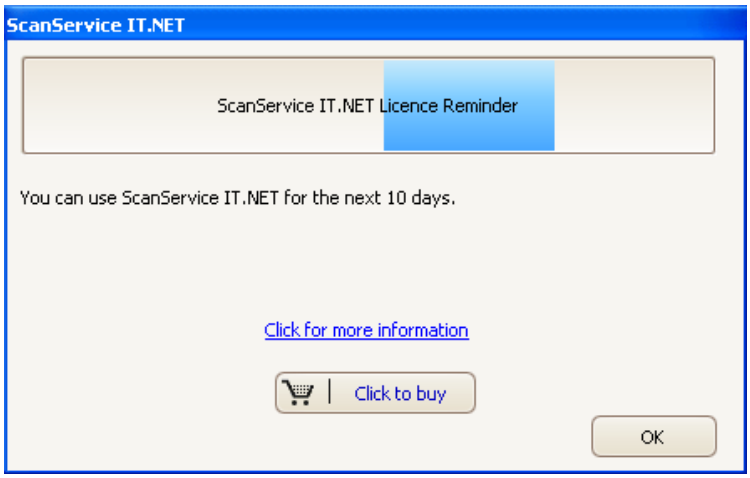
On the next step you will need to specify you connection settings. If you use proxy for connecting to the Internet, then, please add server and port to the corresponding fields. 'No proxy' should be selected if you use direct connection to the Internet.

**



Then you will need to click 'Finish' button to exit the Wizard and complete evaluation registration.

Each time you start the addon the program will offer you to purchase a license or to continue using the evaluation:


ScanService IT.NET
ScanService IT.NET Licence Reminder
You can use ScanService IT.NET for the next 10 days.
Click for more information
Click to buy
OK

To proceed with trial just click 'Ok' button. On this window you will see the name of the addon you are using and how many days of trial are left.

**

If you would like to purchase a license you will need to click 'Click to buy' button.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

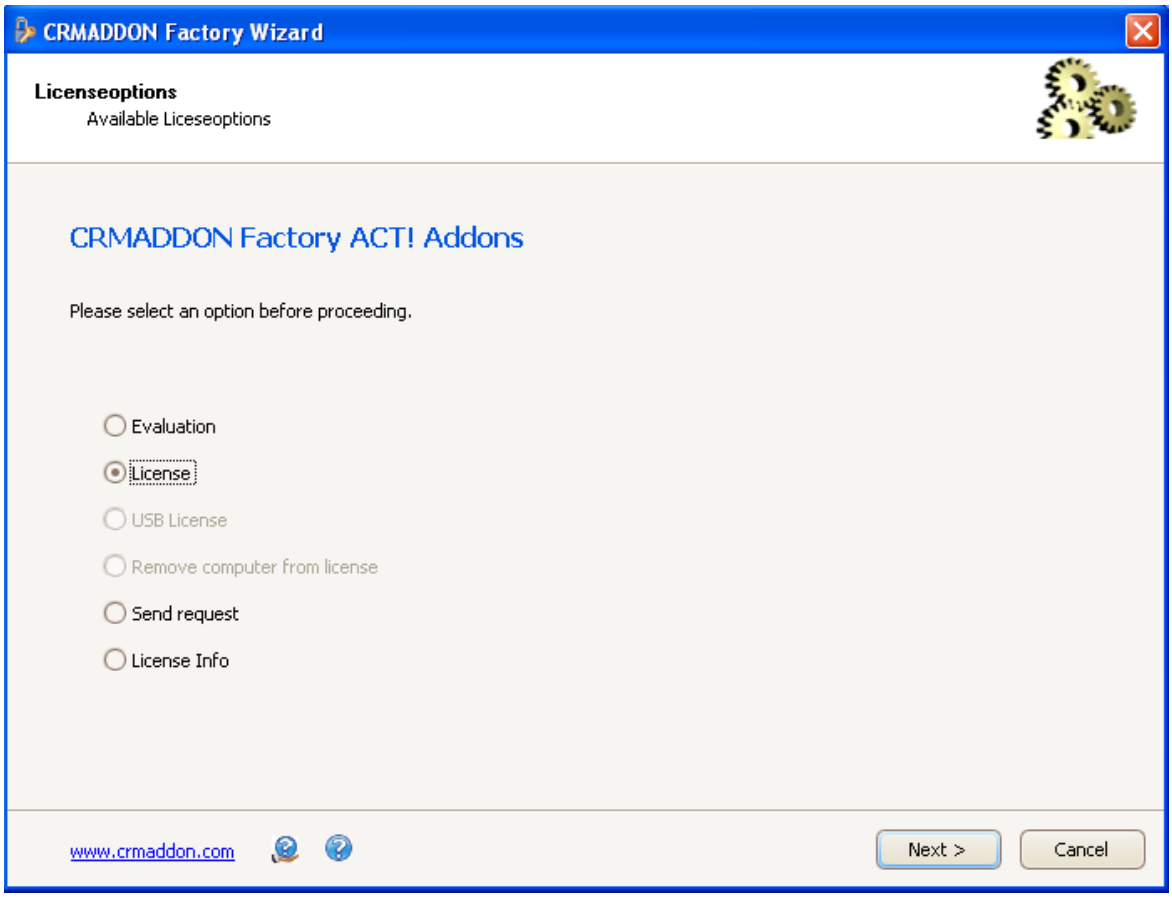
See also:

License
Remove computer from license
Send Request
License Info

**

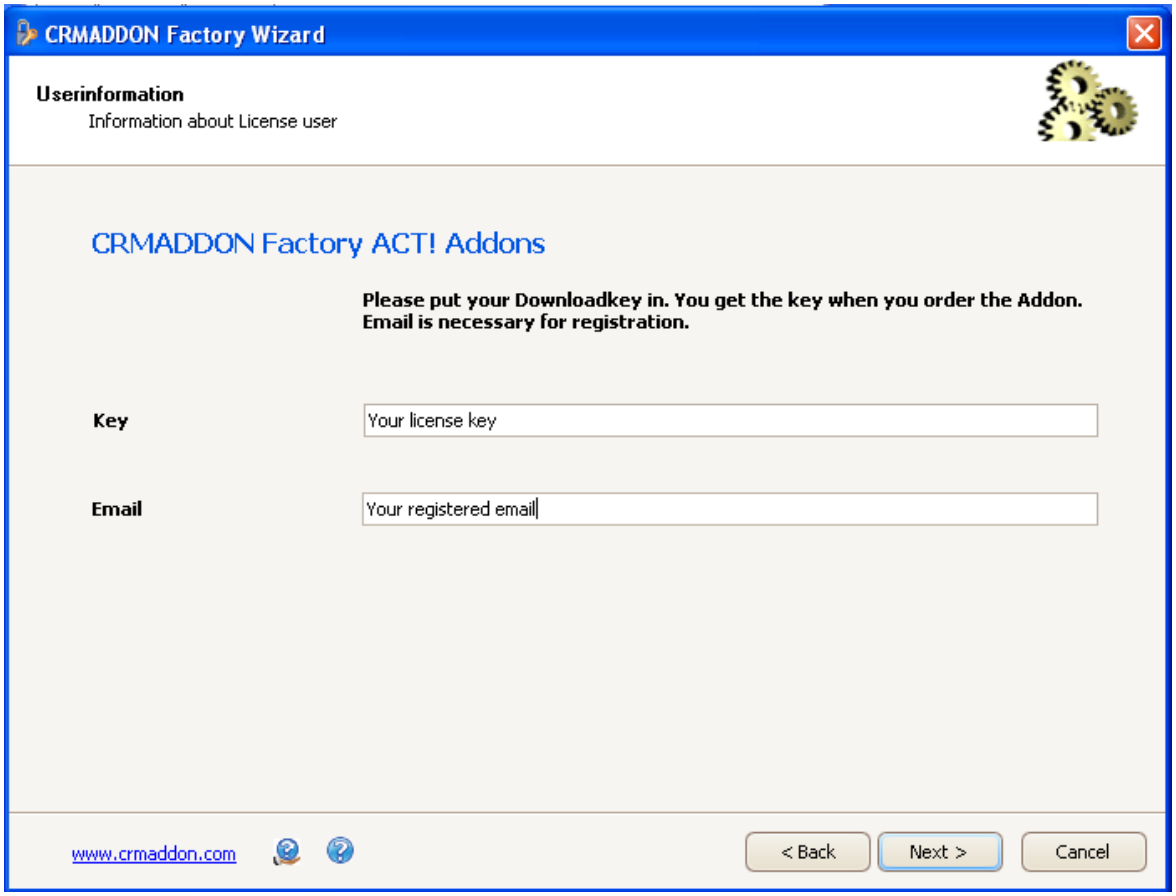
License

By selecting this option you can license the product you are using. To do this you need to specify the registration key you received from our team. The license is provided per user computer, i.e. single licence is for 1 machine where the software is installed. If you purchase 3 licenses you will receive one license key which should be used for all machines.
The system automatically connects to the server and checks your license, e.g. if there are free licenses for your computers or not.



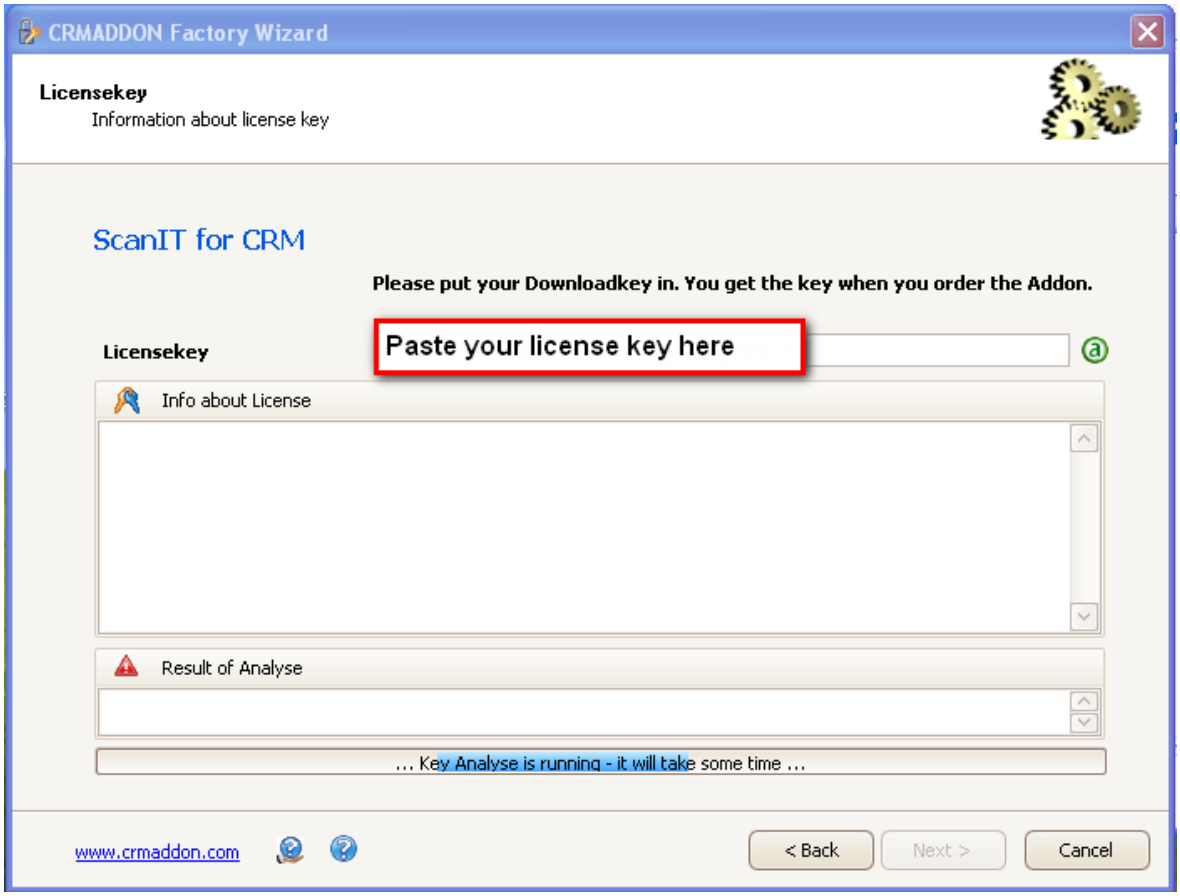
On the next window you will need to specify your license key and email registered in our system:

**

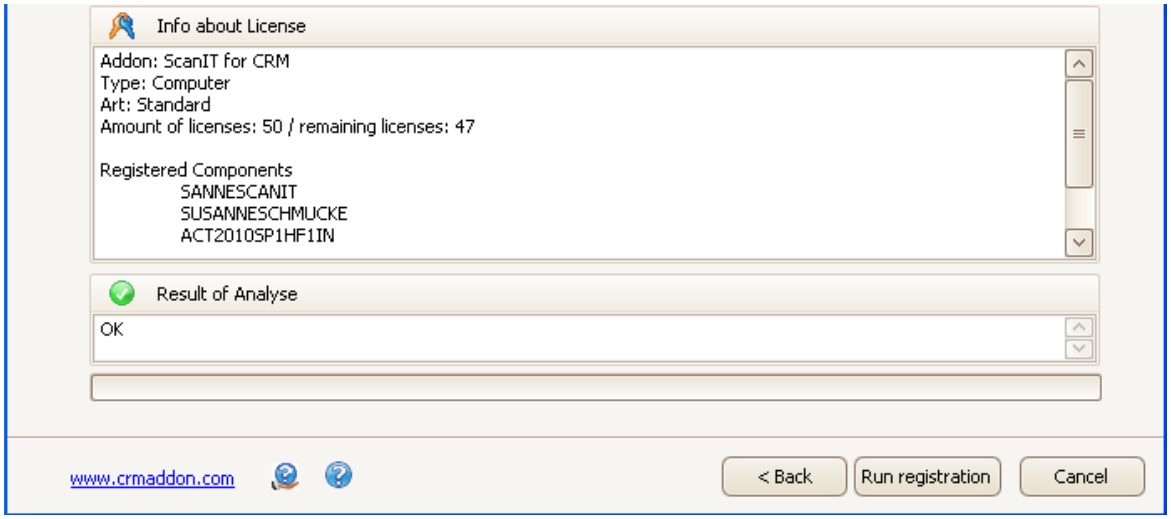


On the next step the system will check if your license key is valid or not, this might take some time, click analyse button to start analyse:

**

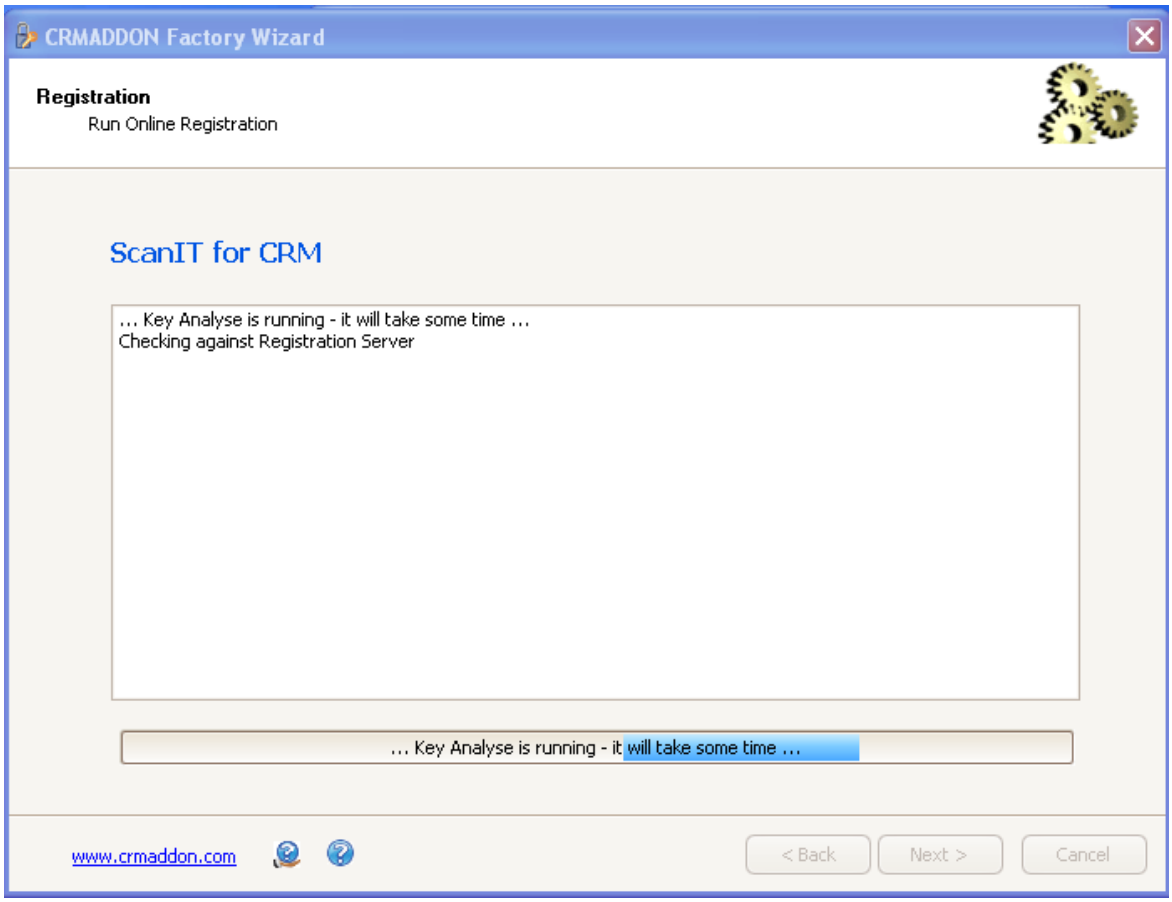

CRMADDON Factory Wizard
Licensekey
Information about license key
ScanIT for CRM
Please put your Downloadkey in. You get the key when you order the Addon.
Licensekey
Paste your license key here
Info about License
Result of Analyse
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Next >
Cancel

If your license key is not valid you will get a corresponding notification and will return back to the start page of the Wizard.
If the validation is successful the following window will appear:



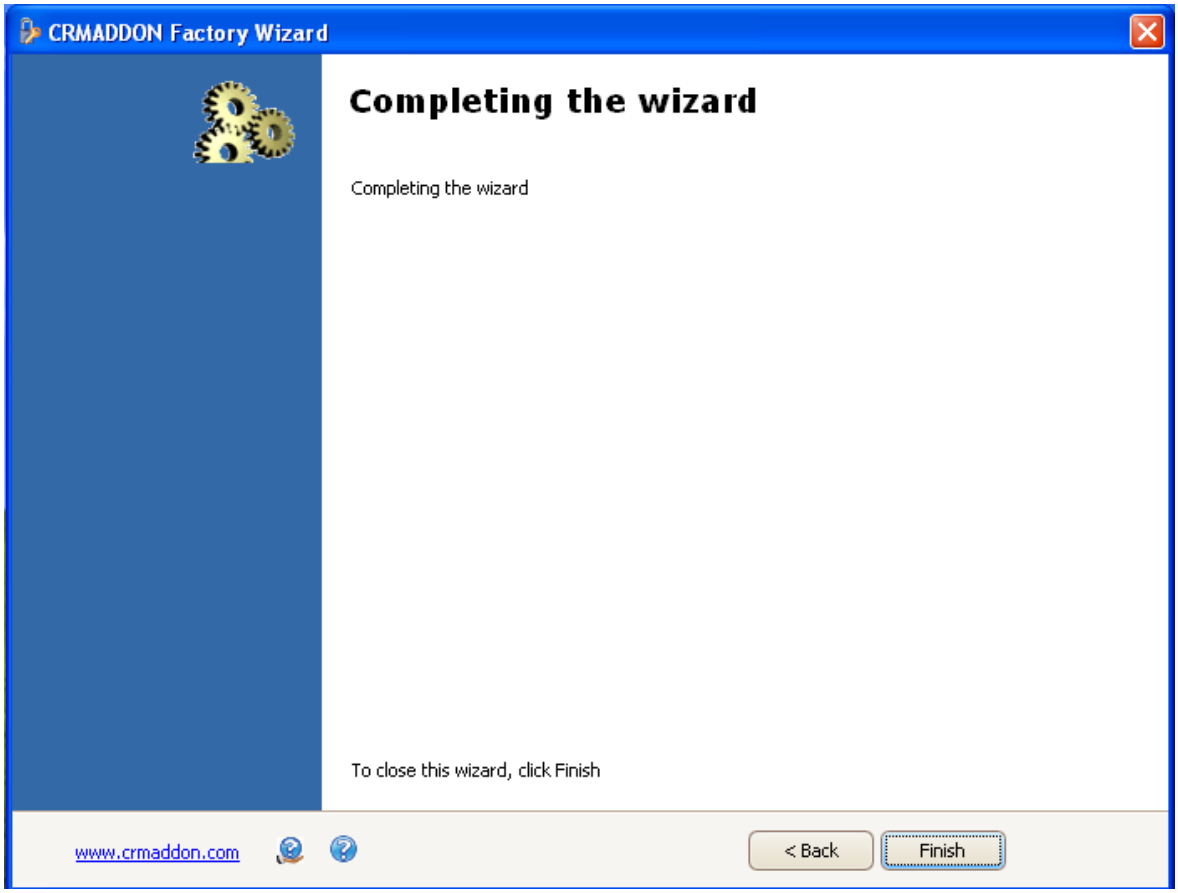
Now you can click 'Run Registration' to proceed with license registration.

**


CRMADDON Factory Wizard
Registration
Run Online Registration
ScanIT for CRM
... Key Analyse is running - it will take some time ...
Checking against Registration Server
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Next >
Cancel

After registration completing you need to click 'Next' to proceed further:

**



Click 'Finish' button to finish licensing and exit the Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also:

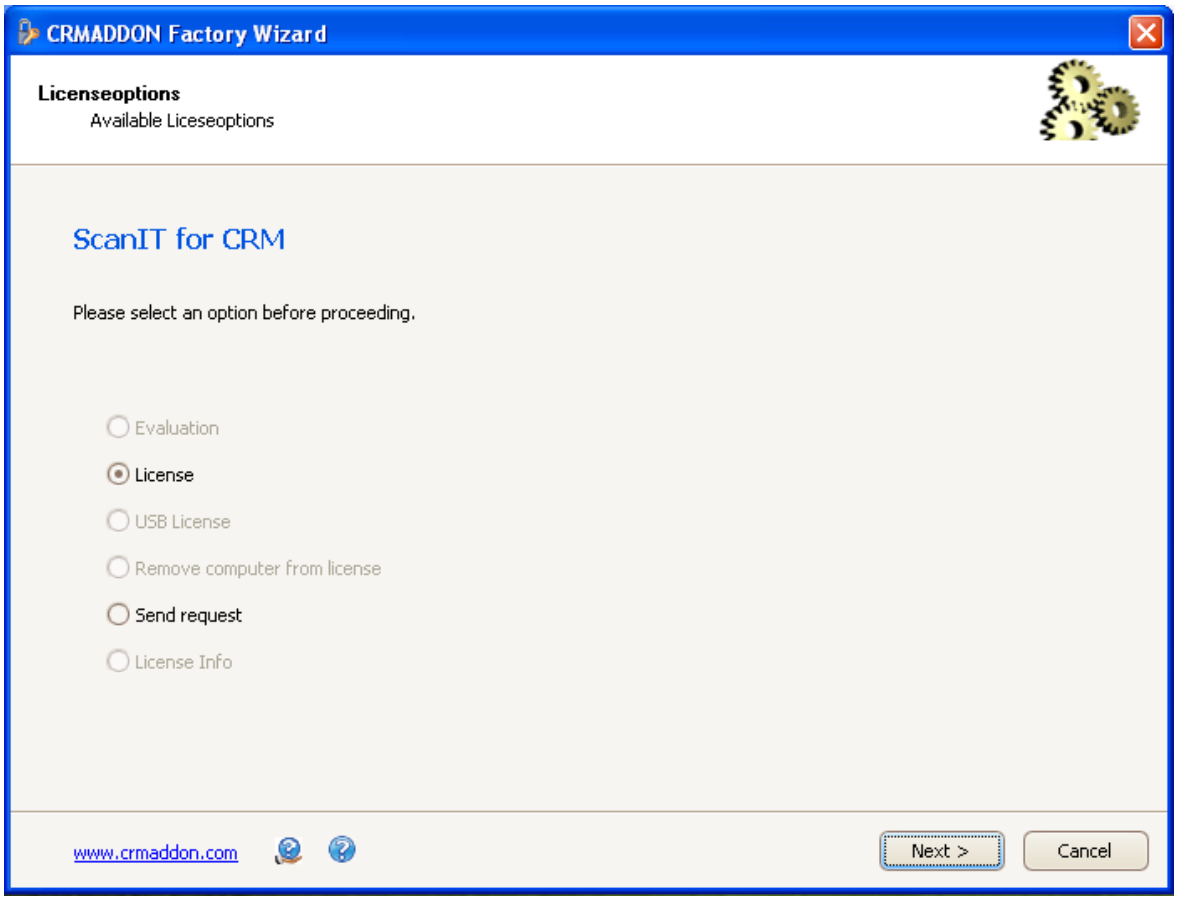
- Evaluation
- Remove computer from license
- Send Request
- License Info

**

Update license

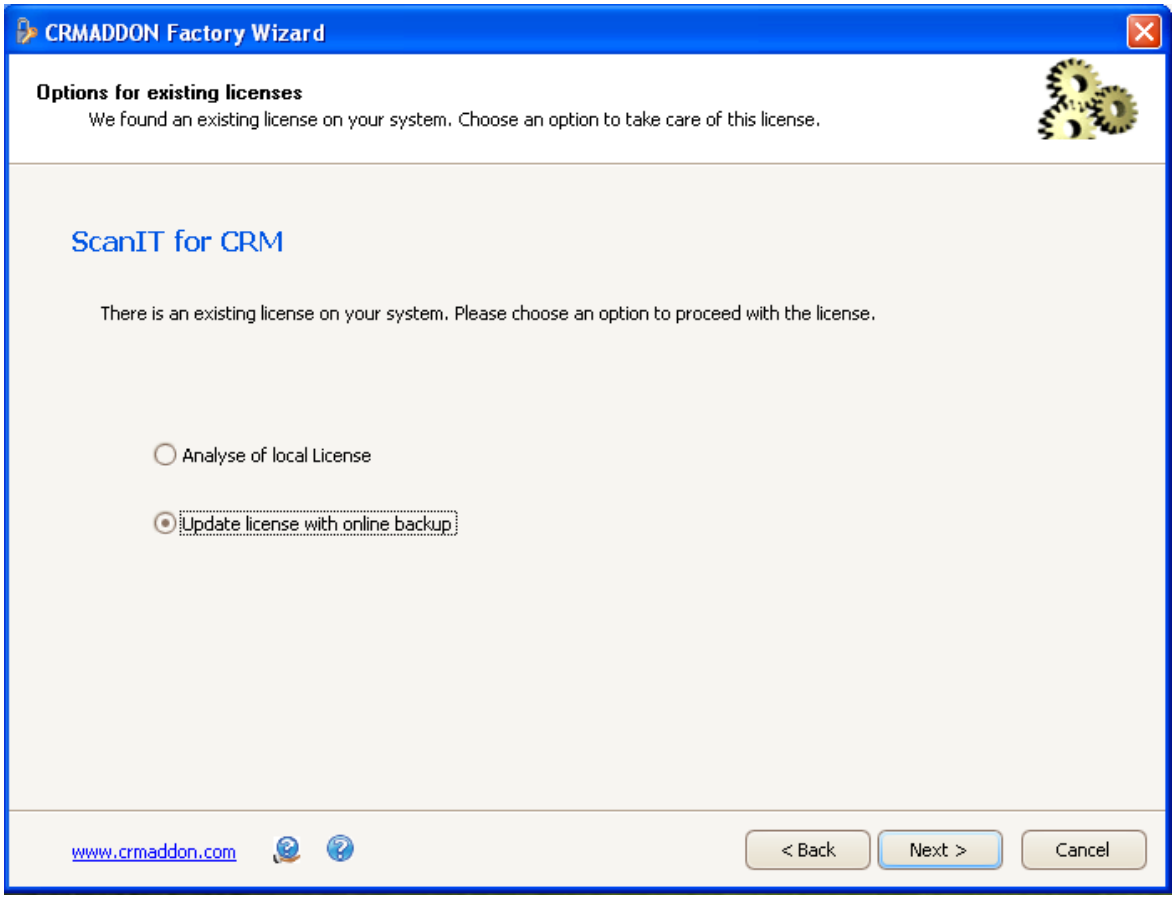
To update your license you need to open 'License and support' window in your addon and follow License tab there. On this tab you need to click 'Wizard for Registration' button

. This will start licensing Wizard, where you can select 'License' option to proceed with updating:



On the next window you will need to select whether you would like to analyse your current license or update the license with online backup.

**


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

If you select 'Analyse of local license' you will need to click 'Analyse button' on the opened window to get details about your current license. To proceed with updating you will need to select 'Update license with online backup'. The further steps will be the same as when you register for the first time. Please find detailed instructions on the 'License' page.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

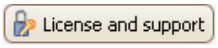
To open our User Manual, please click button at the bottom of the Wizard.

See also:

**

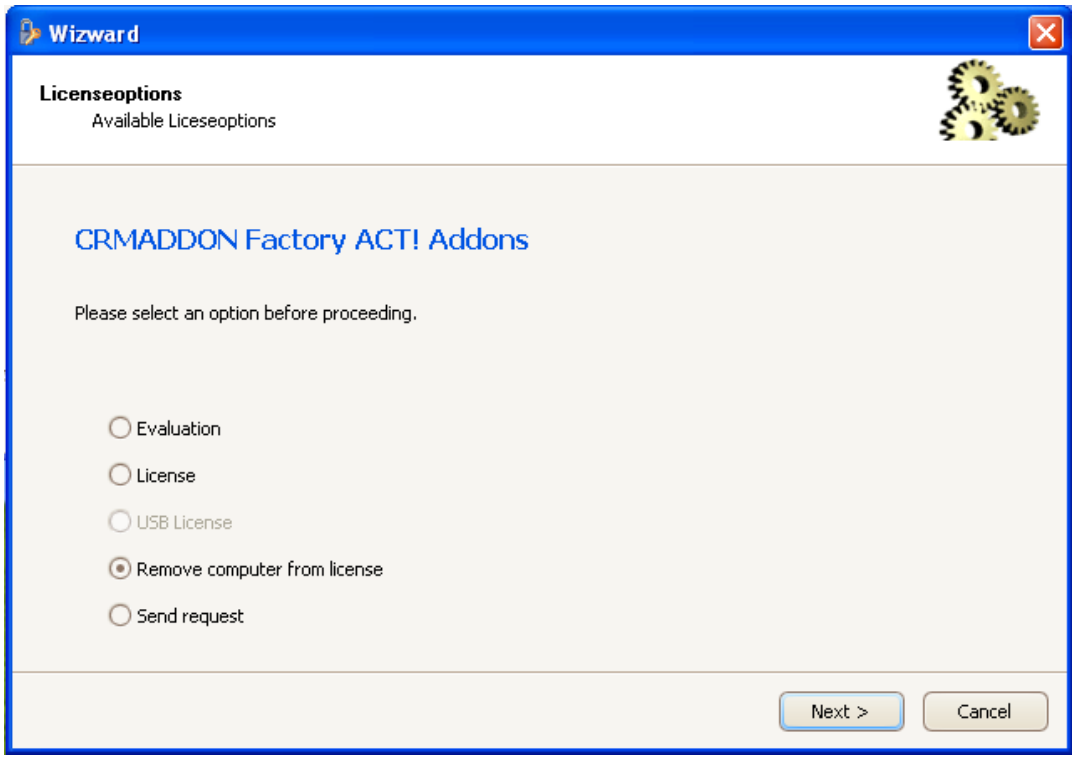
Remove computer from license

This option allows moving the license to another machine. It is possible to change computers only twice then it will not be possible to reset a license. For example if you have a single machine license you can change the computer twice. In case you need to do this more times you will need to create a ticket for our support team.

To remove the computer you need to click 'License and support' button 

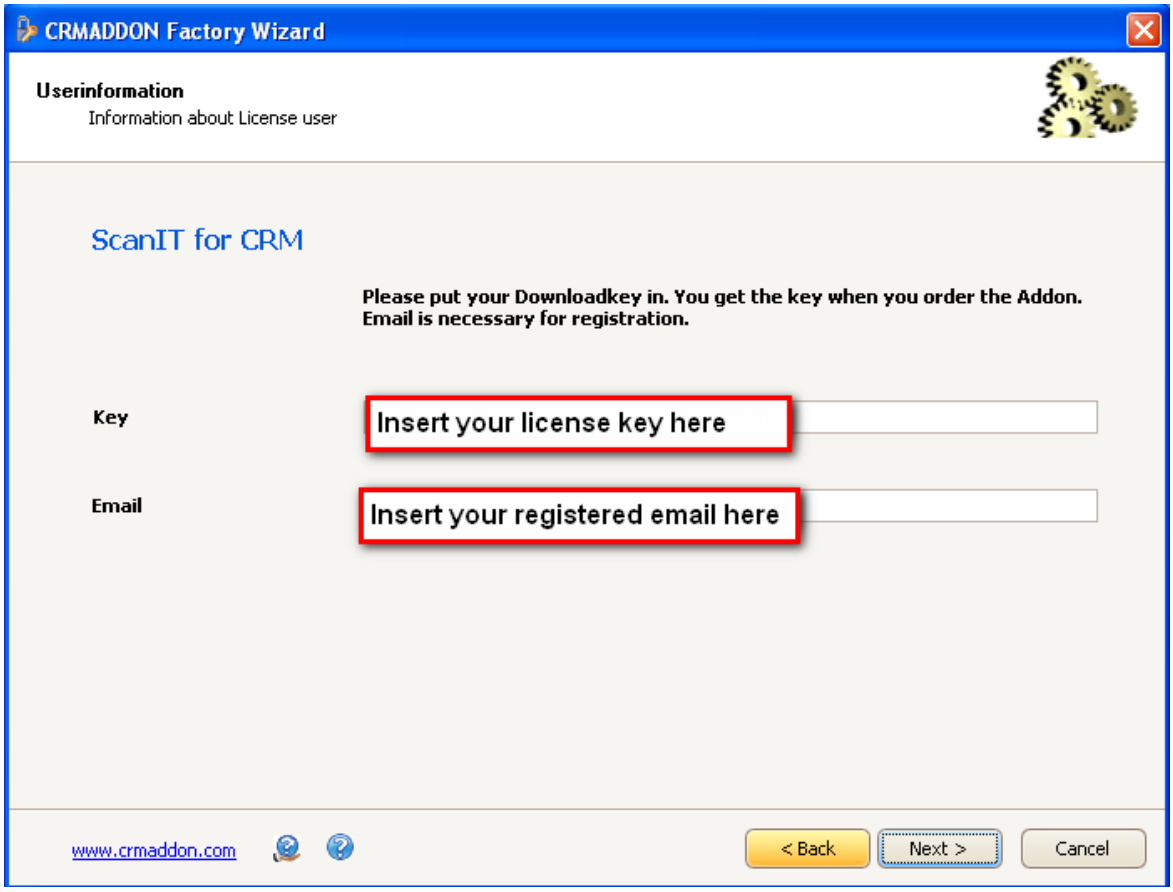
and then select Wizard for Registration on the License tab:

On the opened window you will need to select 'Remove computer from license' option.



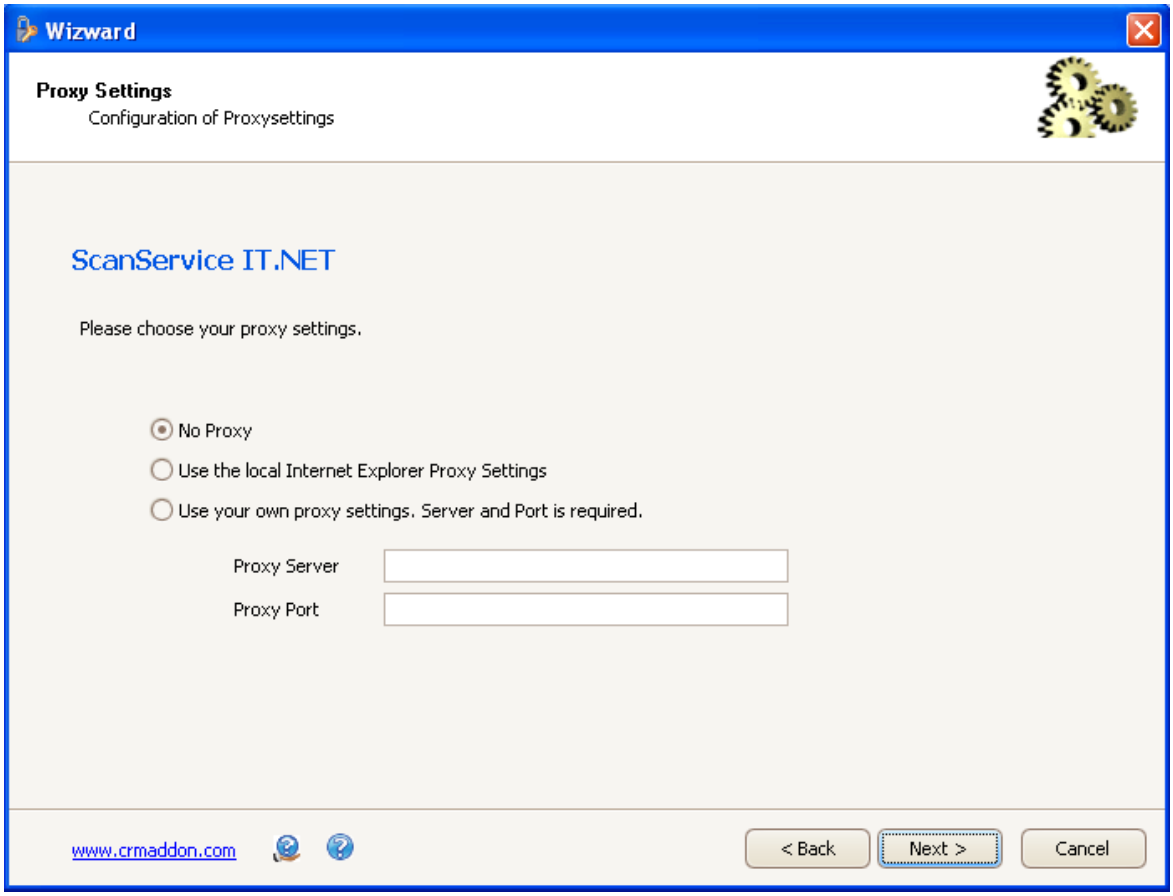
Then you will need to provide your license information and proceed by clicking 'Next'.

**



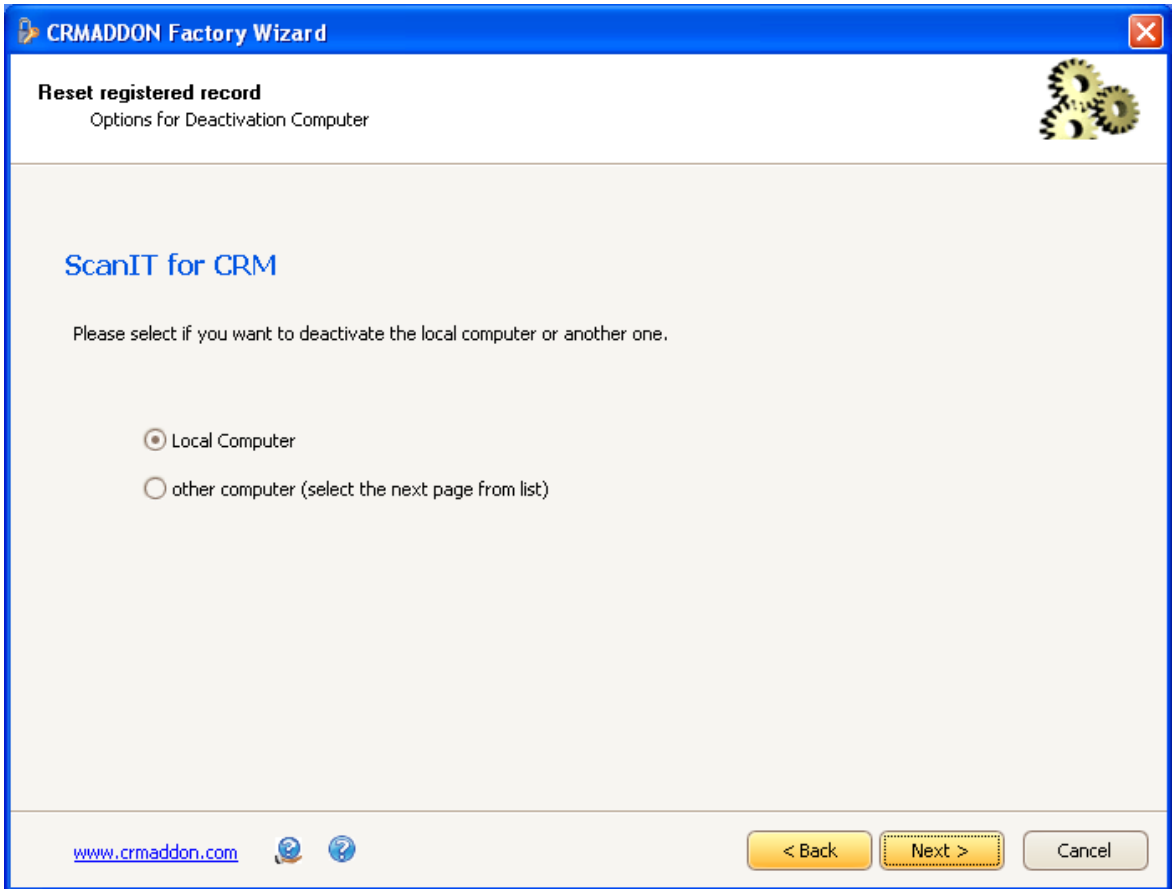
On this window you need to select connection options you have. If you have direct connection to the Internet, then select 'No proxy' option:

**



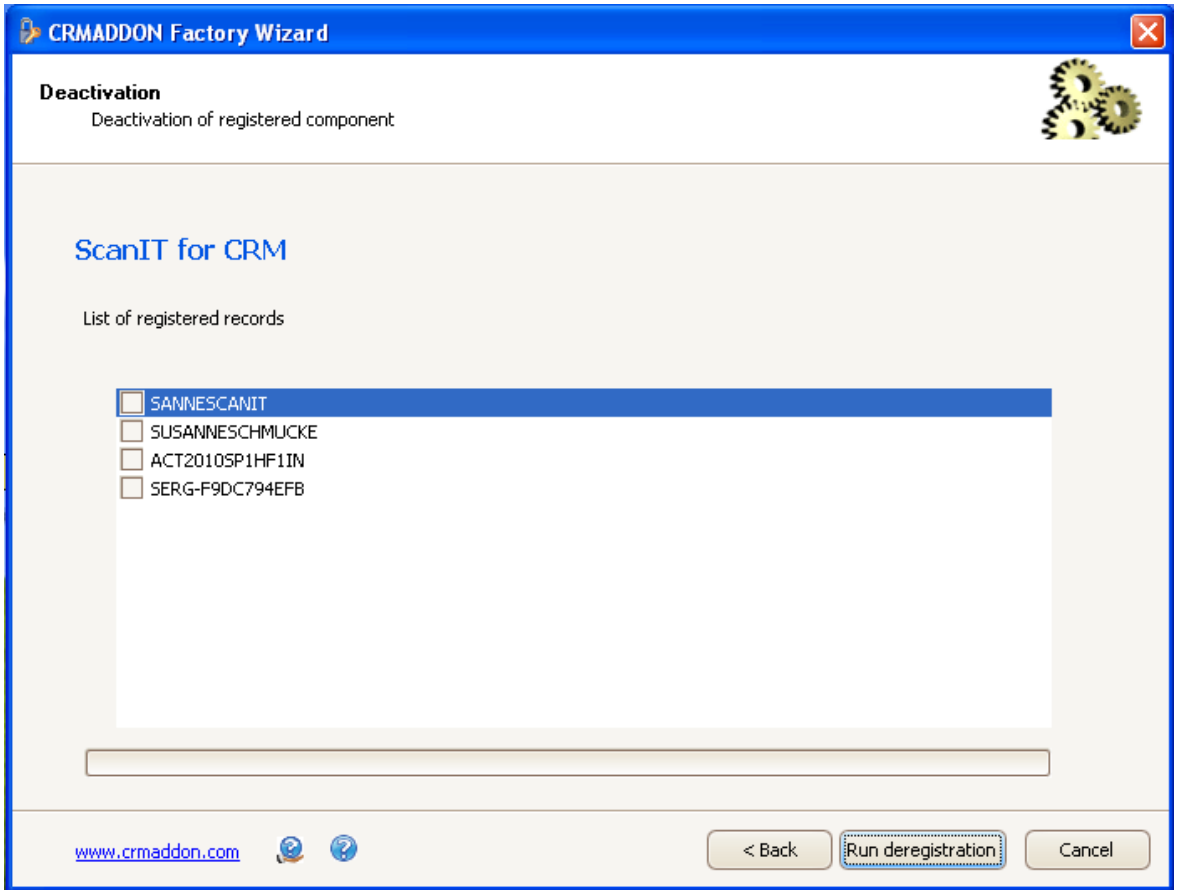
On the next window, please select an option you would like to proceed with: whether you would like to deactivate a local computer or select another machine from the list:

**


CRMADDON Factory Wizard
Reset registered record
Options for Deactivation Computer
ScanIT for CRM
Please select if you want to deactivate the local computer or another one.
Local Computer
other computer (select the next page from list)
www.crmaddon.com
< Back
Next >
Cancel

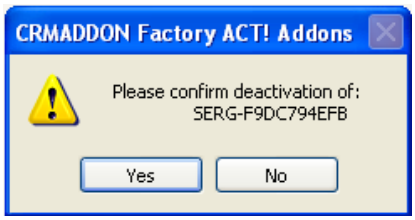
If you need to deactivate some other machine, please select 'Other computer' option, the following window will open:

**



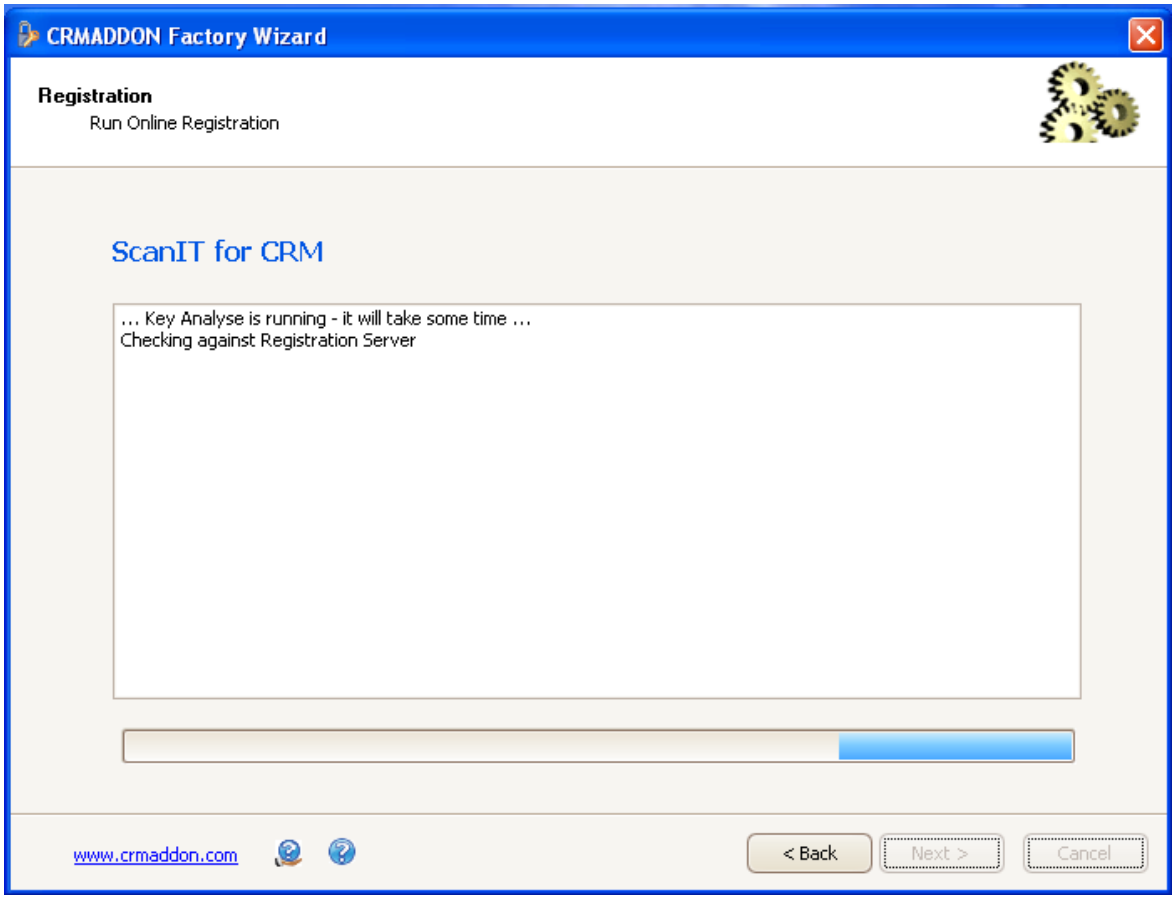
Here you can select the computer you would like to deactivate, click 'Run deregistration' button to proceed further.

If you select 'Local Computer' option, the system will ask you to confirm deactivation:



Click 'Yes' to proceed with deactivation:

**



Once the system finishes license key checking, the following text will appear notifying that the deactivation was completed:

... Key Analyse is running - it will take some time ...
Checking against Registration Server
Backup license on the server for future reload
Save license locally
Deactivation done

Click 'Next' button to proceed and then 'Finish' to close the Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

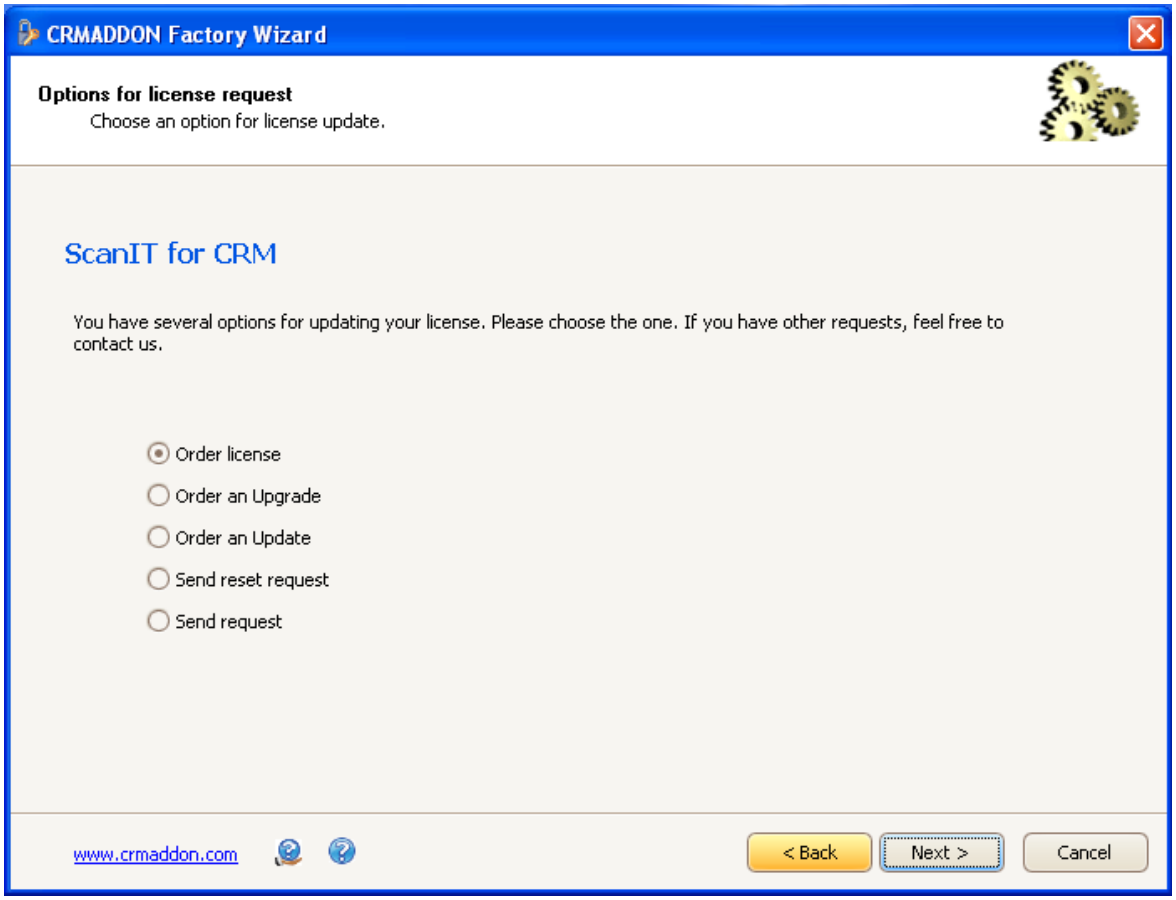
See also:

Evaluation
License
Send Request
License Info

**

Send Request

Use this option if you would like to send us a request concerning upgrading your ACT! version, ordering license, adding more computers to the license or resetting a computer from license:


CRMADDON Factory Wizard
Options for license request
Choose an option for license update.
ScanIT for CRM
You have several options for updating your license. Please choose the one. If you have other requests, feel free to contact us.
Order license
Order an Upgrade
Order an Update
Send reset request
Send request
www.crmaddon.com
< Back
Next >
Cancel

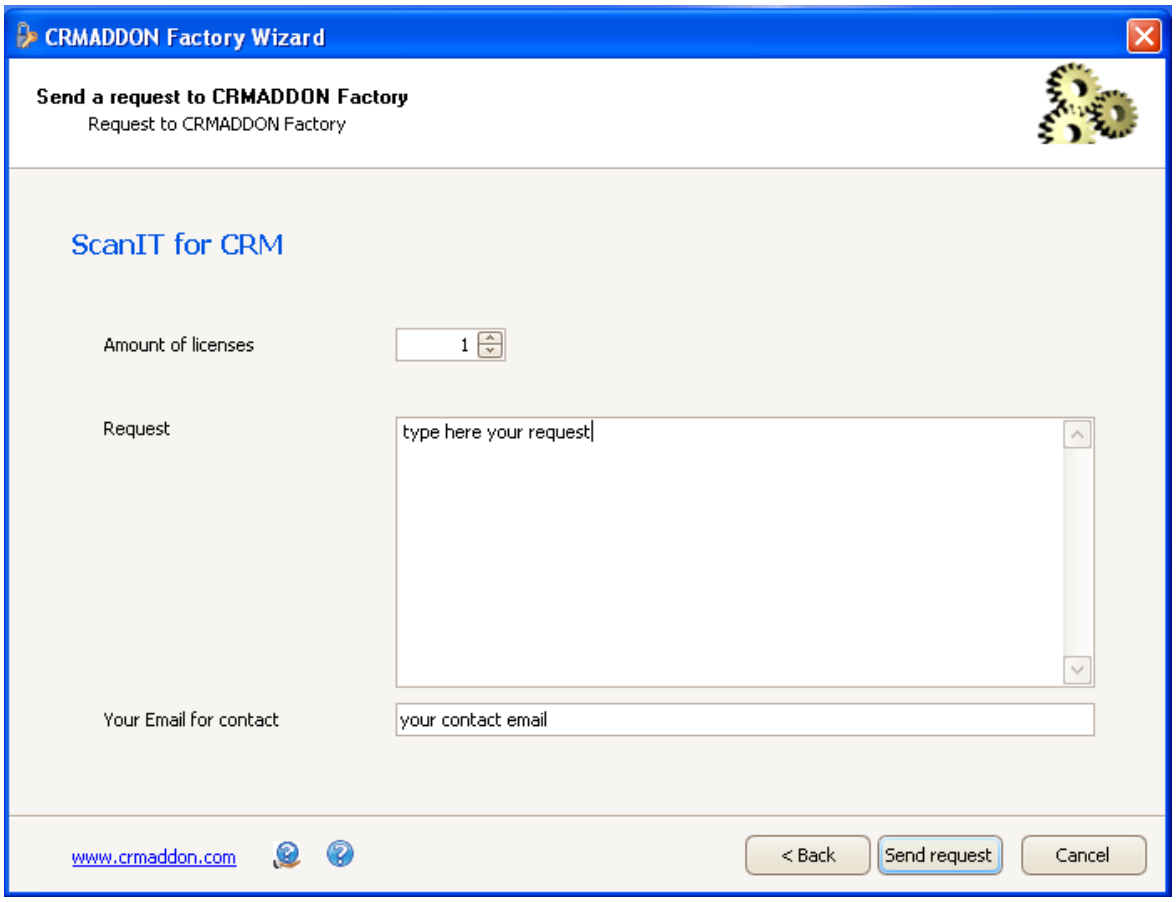
See also:

Evaluation
License
Remove computer from license
License Info

**

Order License

Select this option if you would like to send us a request for license ordering. The following window will open:



On this window you will need to specify the amount of licenses you would like to order, type your request and provide your contact email.

See also:

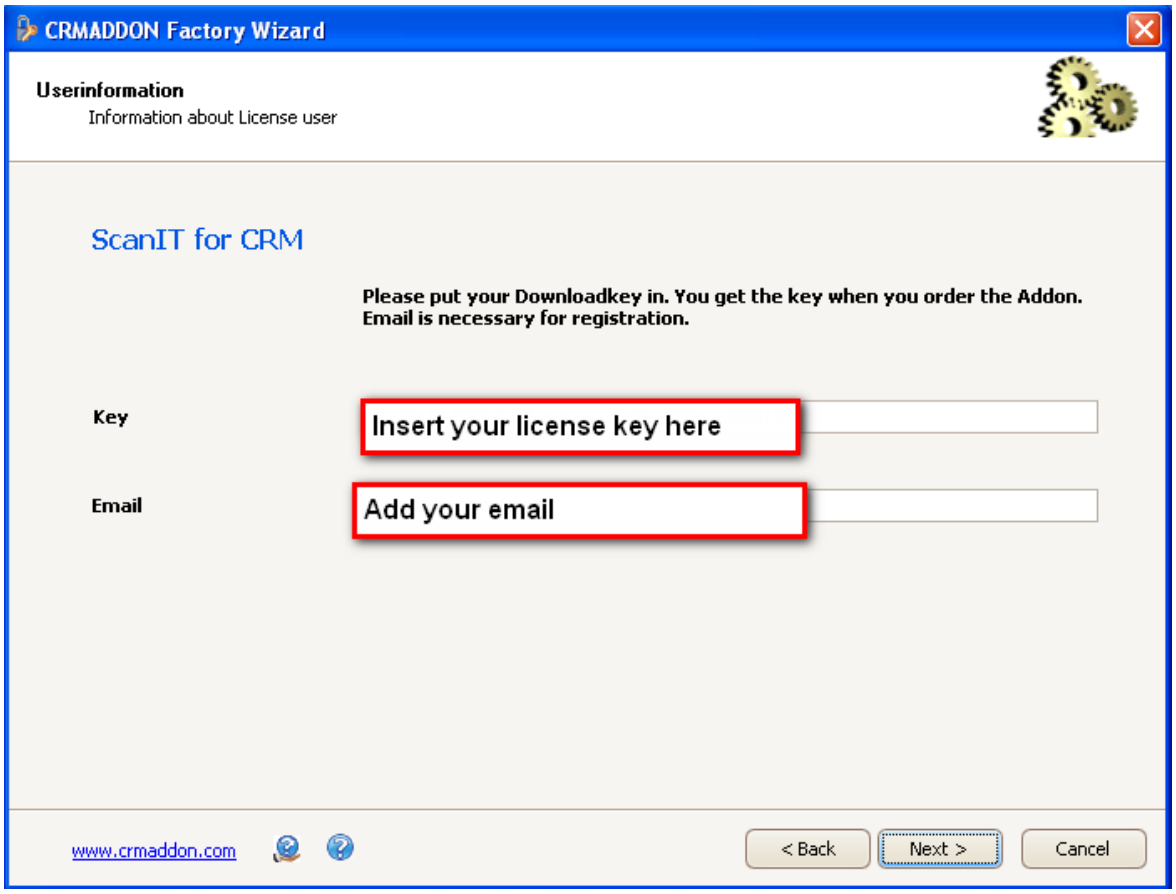
Order an Upgrade
Order an Update
Send Reset Request
Send Request

**

Order an Upgrade

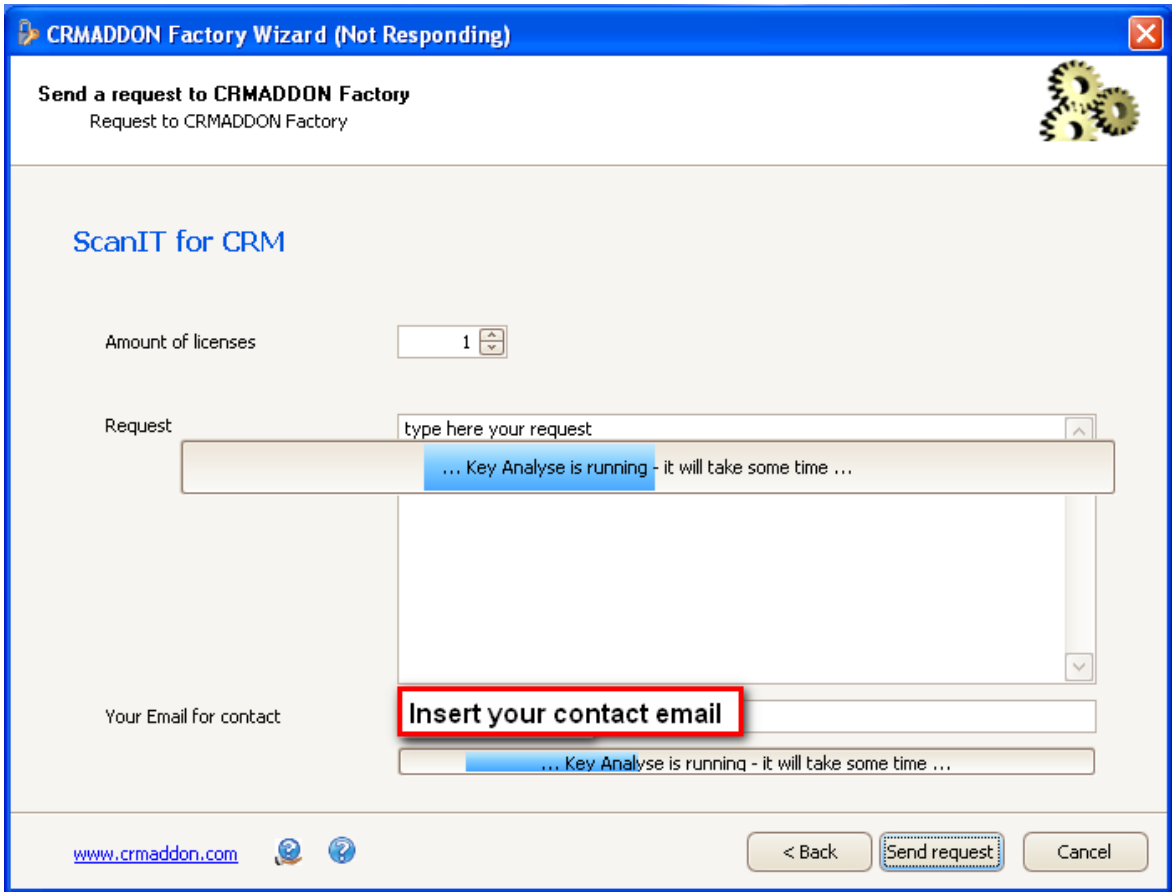
Here you can order an upgrade of your ACT! version.
If you do not change your ACT! version and would like to get a software upgrade within the same version release, for example upgrade 2.3 version to 2.6. version, this will be done for free. However, if you would like to upgrade from 2.x.x version to 3.x.x version then you will need to purchase an upgrade. You will get the upgrade already starting at as low as 10% of the addon license cost. The support for the latest version is provided for free. In case you have an old version, you will need to purchase support units or upgrade to the latest version.

The following window will open after you select 'Order Upgrade' option:



Here you will need to provide your license key and email you are registered with in our system. To proceed further just click 'Next' button.

**


CRMADDON Factory Wizard (Not Responding)
Send a request to CRMADDON Factory
Request to CRMADDON Factory
ScanIT for CRM
Amount of licenses
1
Request
type here your request
... Key Analyse is running - it will take some time ...
Your Email for contact
Insert your contact email
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Send request
Cancel

Here you will need to specify the amount of licenses, type your request and provide contact email, where you would like our support team to send you a reply. Then click 'Send request' button to submit your request. To exit the Wizard just click 'Finish' button on the next window.

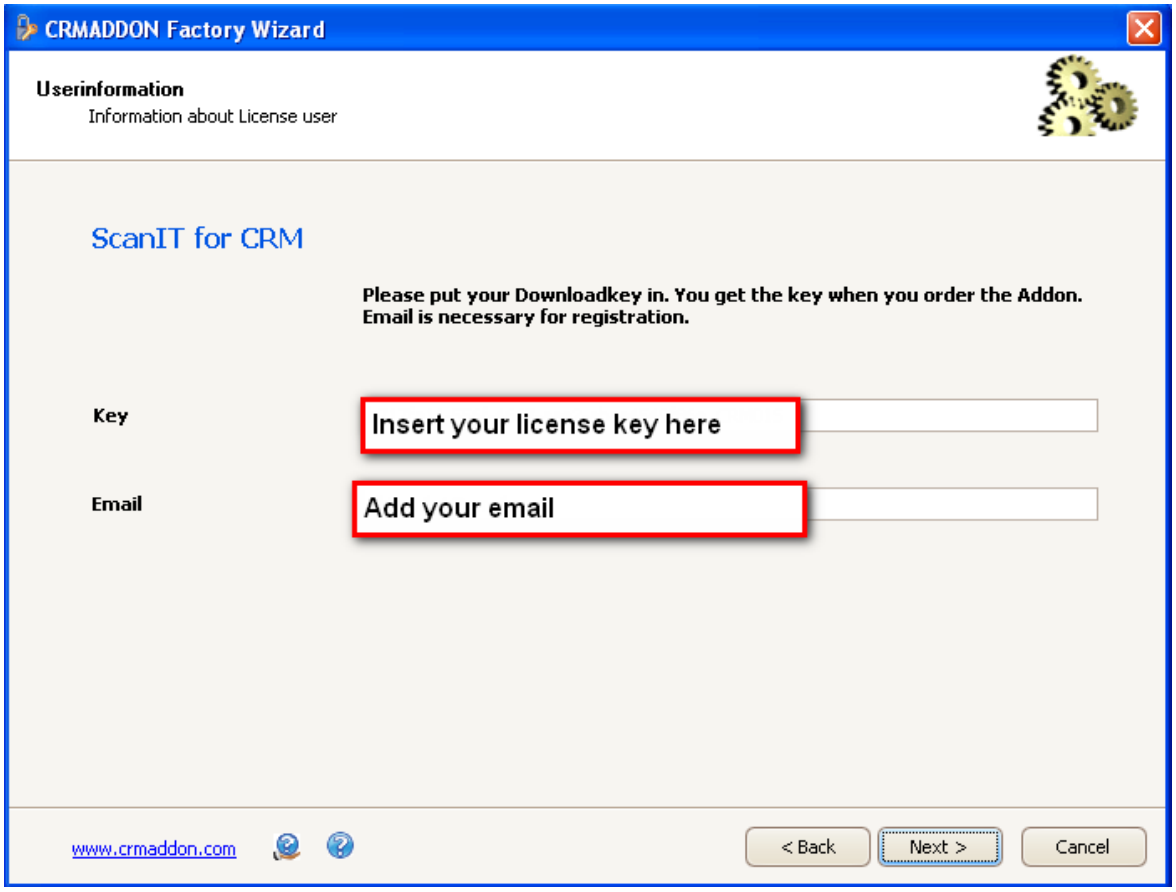
See also

Order license
Order an Update
Send Reset Request
Send Request

**

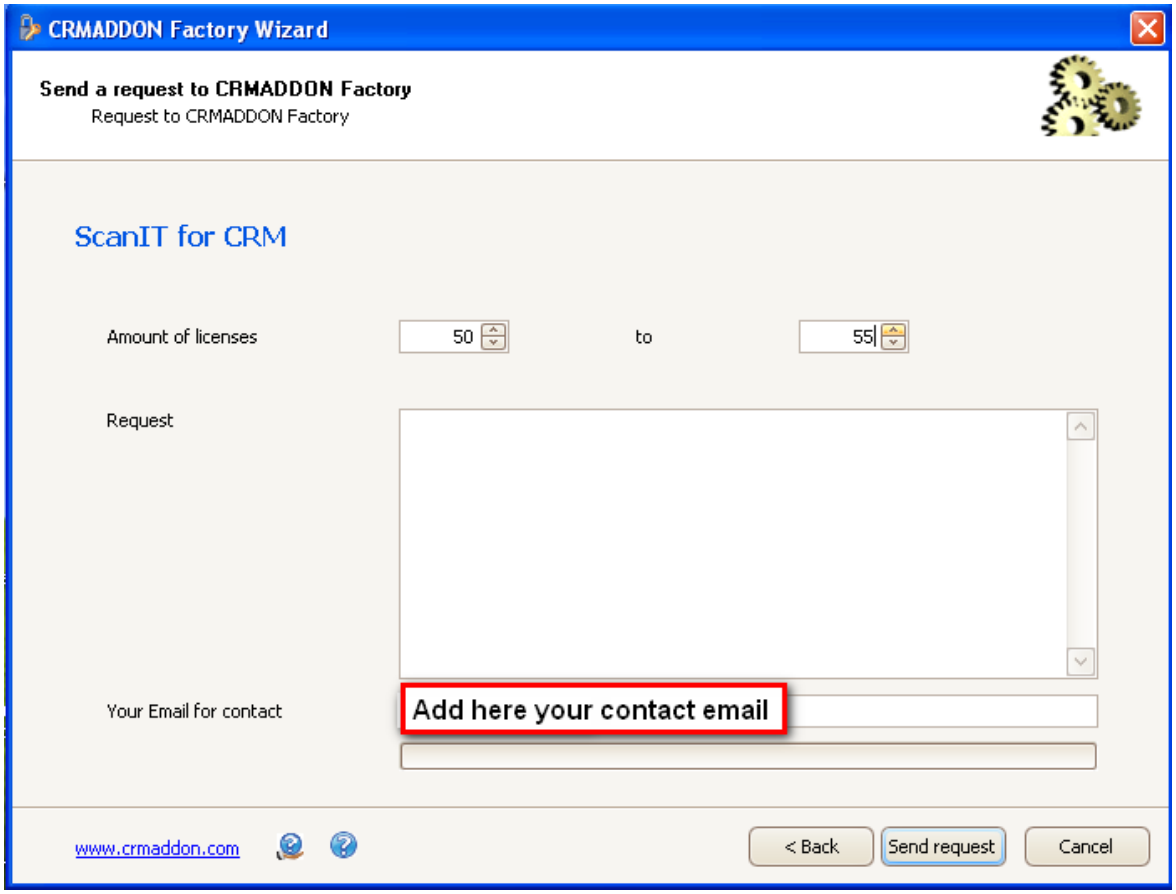
Order an Update

Select this option if you would like to purchase more licenses of the addon.
On the following window specify your licence key and registered in our system email:



Specify here the number of licenses you would like to upgrade to, type your request and provide an email you would like to get a reply to.

**



To proceed click 'Send Request' button and on the next window click 'Finish' to exit the Wizard.

See also

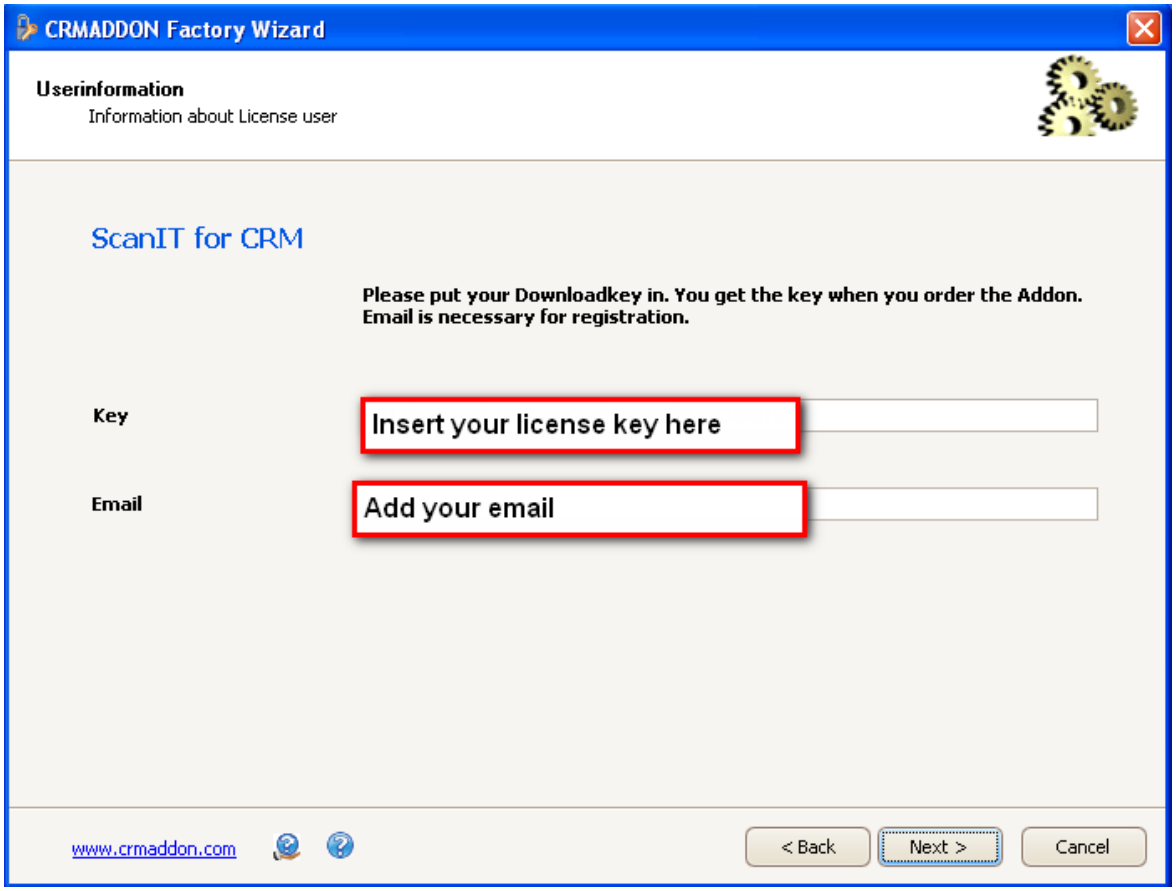
Order license
Order an Upgrade
Send Reset Request
Send Request

**

Send Reset Request

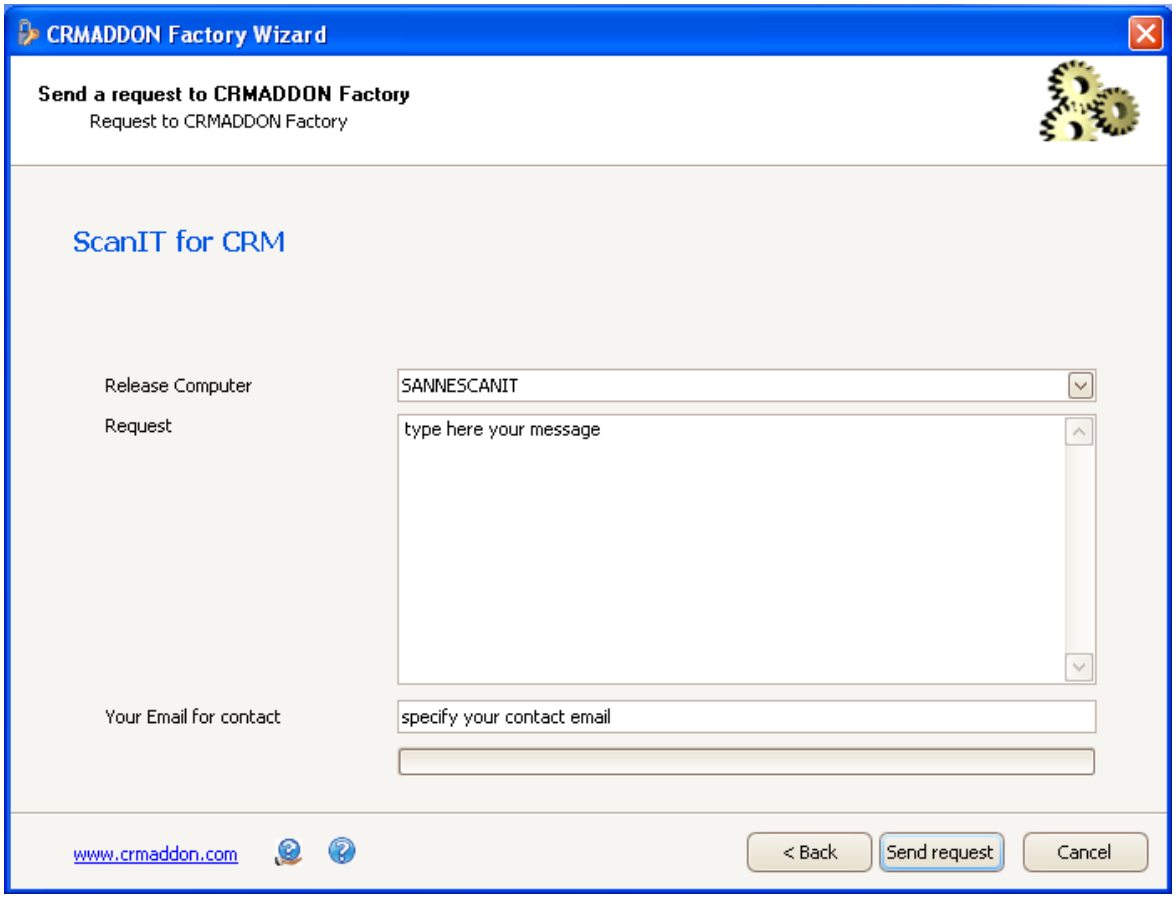
If you have already removed computers from licensing 2 times, then you will need to send us a reset request to reset your machine from licensing. You can do this by selecting '[Send reset request](#) ' option.

On the following window you will need to specify your license key and registered in our system email:



On the next window you will need to select a computer you would like to release from the license from the drop down list. type in your request and add contact email.

**



Press 'Send Request' button to submit your request.

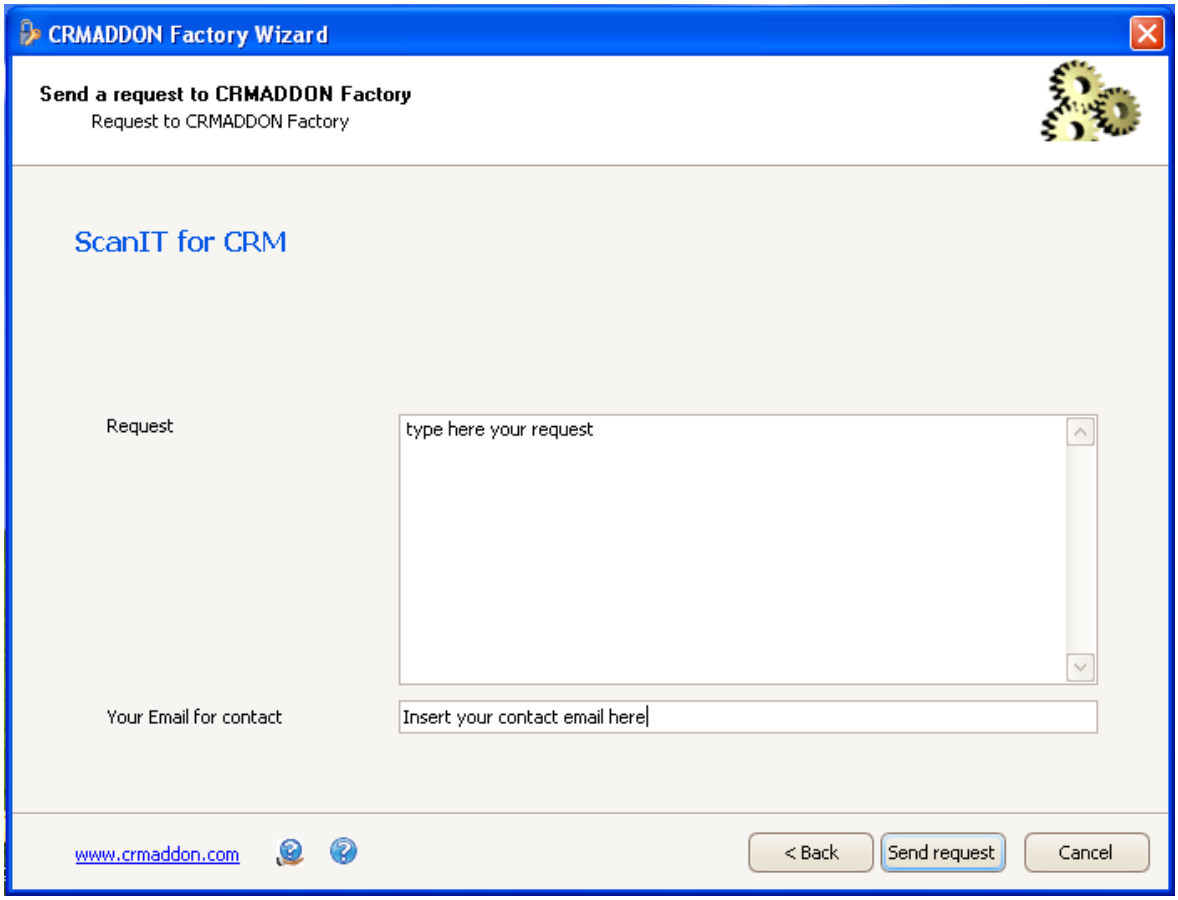
See also

Order license
Order an Upgrade
Order an Update
Send Request

**

Send Request

You can use this simple form to send us a request. Just type in your question and provide the email you would like us to reply to:



See also

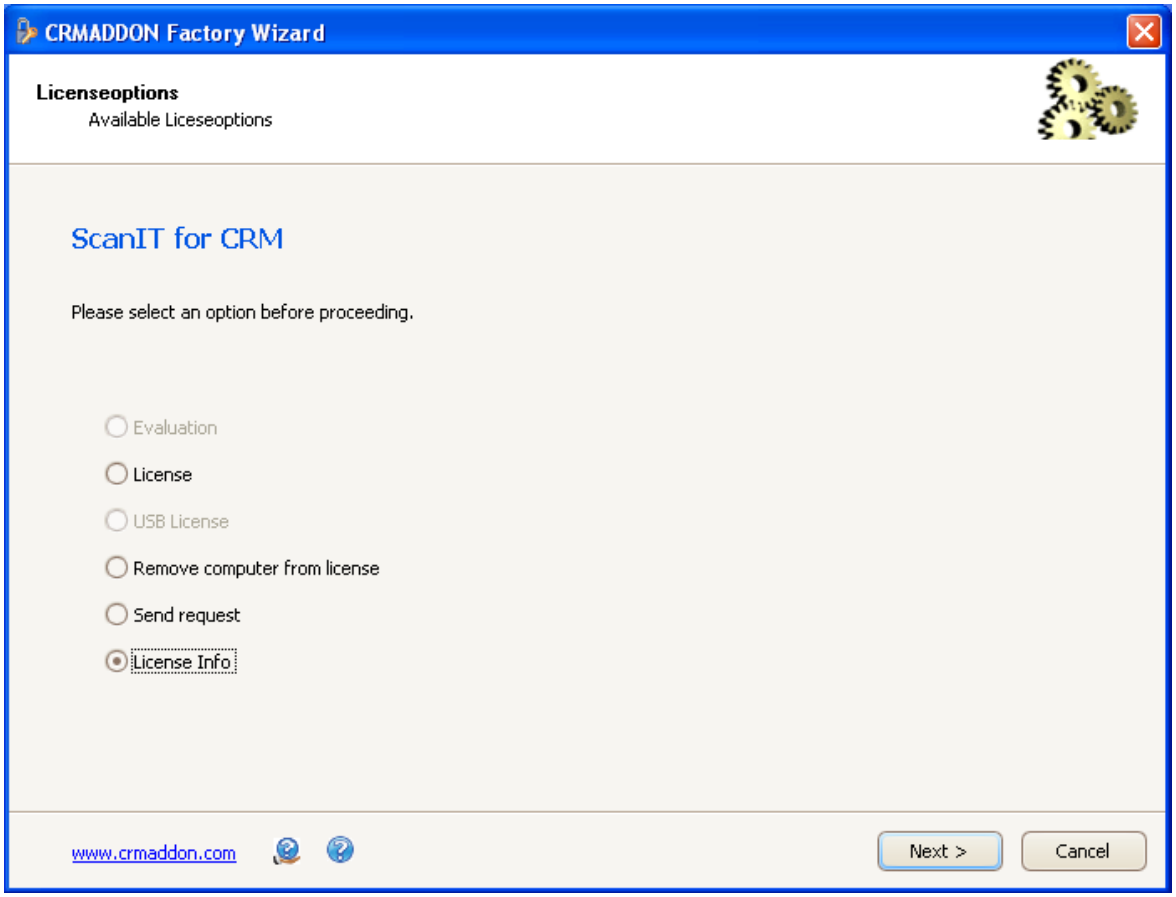
Order license
Order an Upgrade
Order an Update
Send Reset Request

**

License Info

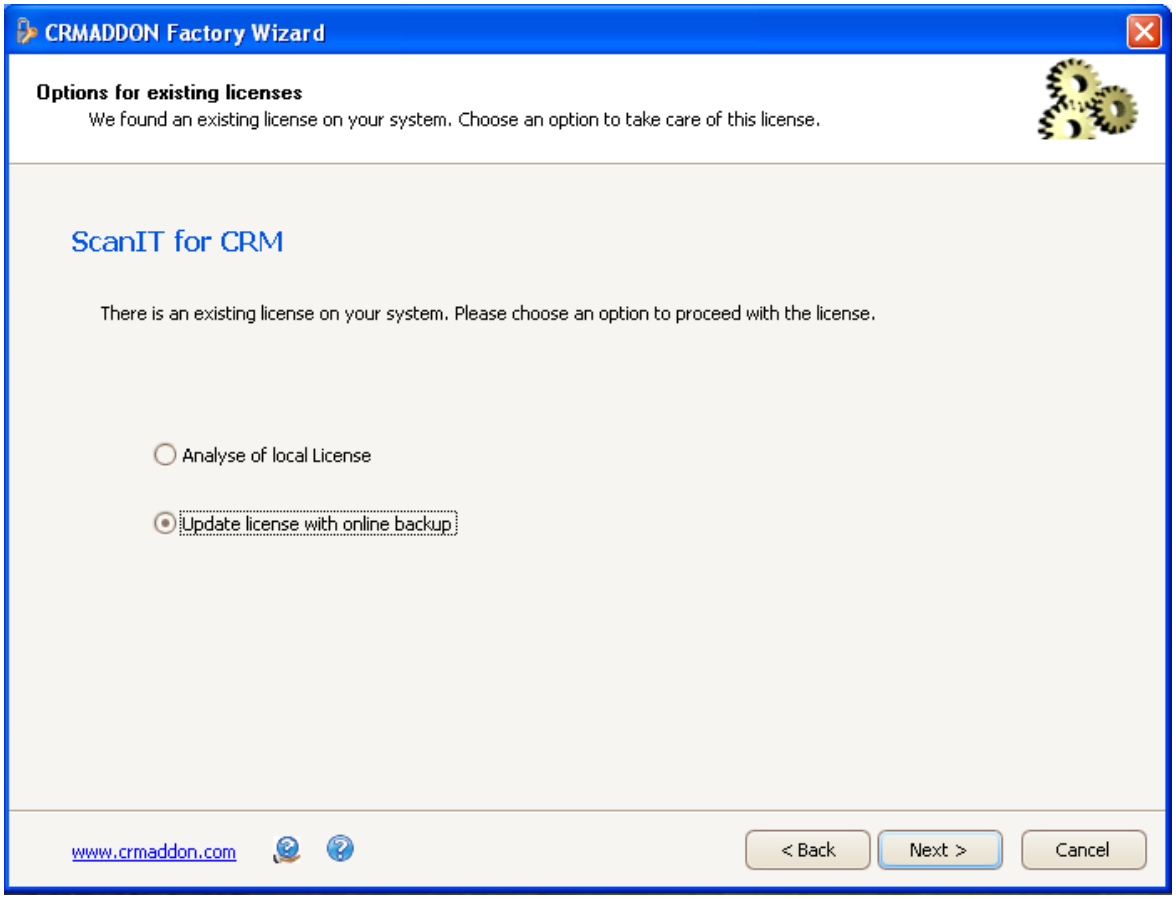
Here you can check the license code for your computer and for other machines where the license is installed. If the machine is in evaluation mode then 'Evaluation' option will be active, if there is a license specified for this machine, then 'Evaluation' will be inactive as shown on the screenshot below.

You need to select the following option on the License Wizard to check your license information:



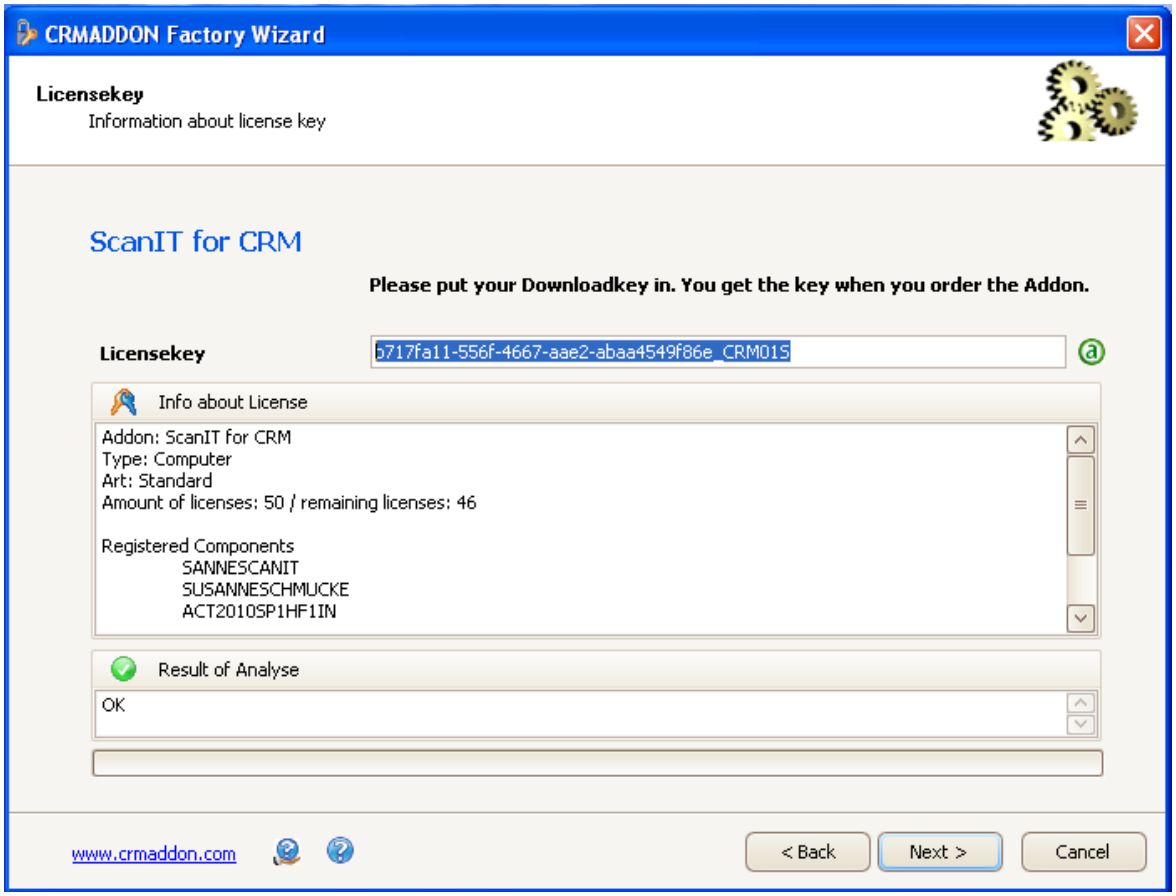
On the next step you can select whether you would like to analyse the local license or update it. You need to select the first option 'Analyse the local license' to get details about the license:

**


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

The following window will open:

**



On this window you will find information about the license owner, number of used and available licenses, what addon is the license for.

To proceed further you will need to click 'Next' button and then 'Finish' to close the License Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also

Evaluation
License
Remove computer from license
Send Request

**

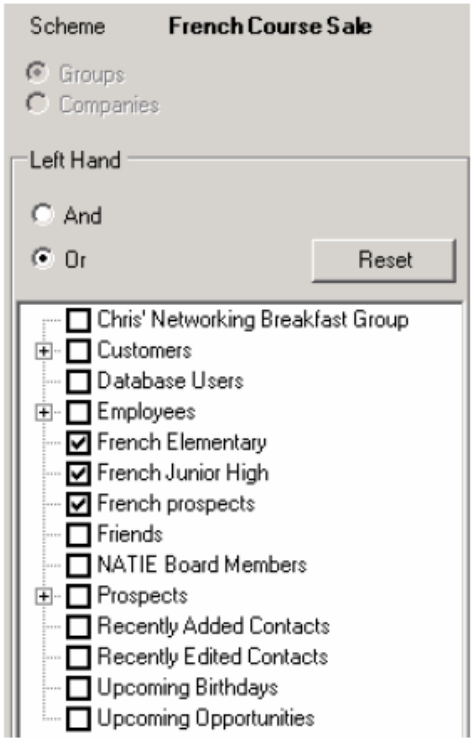
Examples how to use Group IT

Or/Exclude Searches for Groups

Joan Smith is a marketing director for a company selling foreign language courses in the private education market.
Her company is offering a sale on its old French high school courses to clear out old inventory before their new courses are released. She wants to call customers who have purchased elementary and junior high courses and prospects who have expressed interest in French, to let them know about the sale, but she wants to be sure not to contact customers who recently purchased the high school course, since they would not be happy to learn that the product they just purchased is now available for less money. The first step, of course, is to create and name a new search as described previously.

To create this search, first look at the left hand side of the screen.

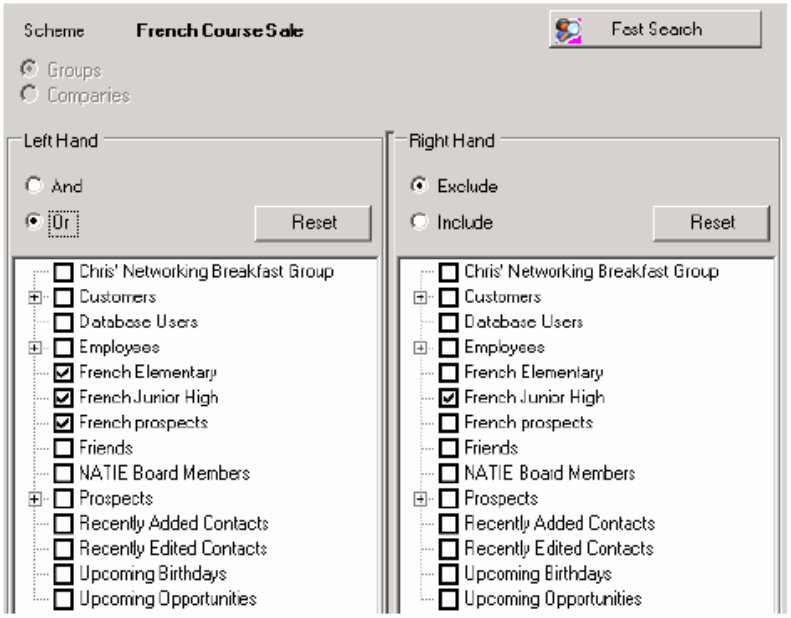
- Do you want to perform an “And” search or an “Or” search? In this example, Joan would want an “Or” search.
- Once you have selected “And” or “Or”, select the groups you want to include in the search. In this example, the included groups are French Elementary customers, French Junior High customers, and French prospects.



To create this search, first look at the left hand side
of the screen. Do you want to perform an “And” search or an “Or” search? In this example, Joan would want an “Or” search.

Once you have selected “And” or “Or”, select the groups you want to include in the search. In this example, the included groups are French Elementary customers, French Junior High customers, and French prospects.

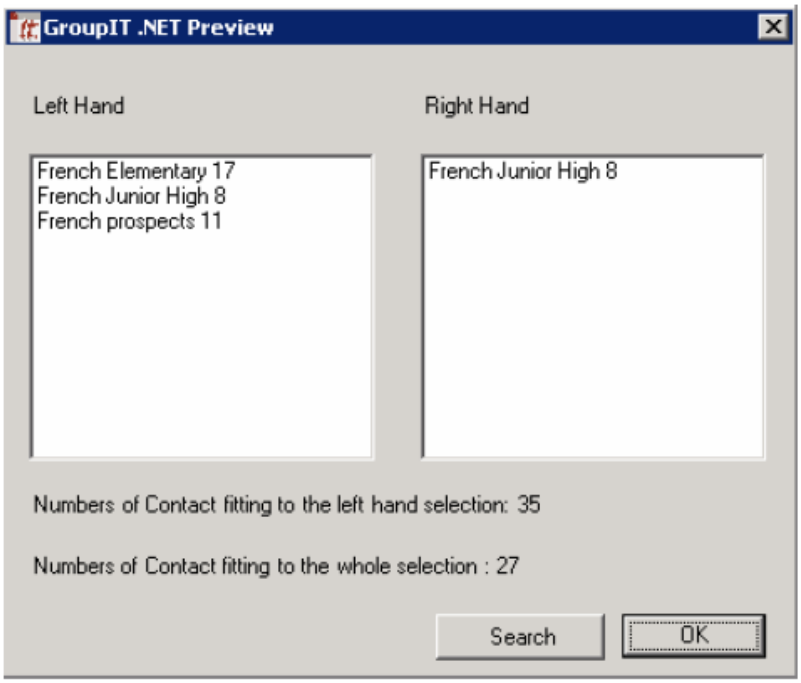
**



Then look at the right side of the screen. Do you want to perform an
"Exclude" search or an "Include" search?
In this example, Joan would want an "Exclude" search.

Choose which groups to exclude from the search. In this example, French high school customers are excluded from the search.

Once you have made your selections, click on *Save* to save your search, then on *Preview* to preview your search.



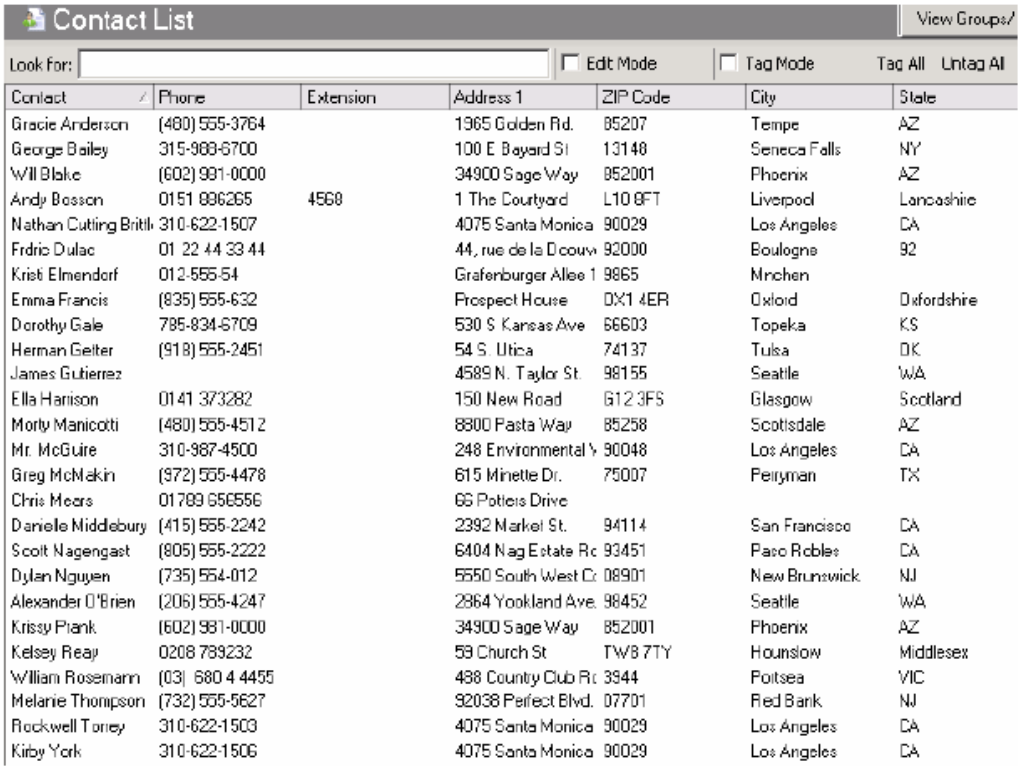
The Preview screen summarizes the elements of the search.

You can see how many contacts match the search.

If you wish to change the search,
click *Okay* to return to the Group IT screen. If you are ready to perform the search, then click on *Search*.

Once the search is completed, the results appear on the Contact List screen in ACT! As you can see, there are no duplicate entries, even though some contacts were in more than one of the groups included in the search.

**



Contact List

View Groups/

Look for: Edit Mode Tag Mode Tag All Untag All

Contact	Phone	Extension	Address 1	ZIP Code	City	State
Gracie Anderson	(480) 555-3764		1965 Golden Rd.	85207	Tempe	AZ
George Bailey	315-988-6700		100 E Bayard St	13148	Seneca Falls	NY
Will Blake	(602) 991-0000		34900 Sage Way	852001	Phoenix	AZ
Andy Bosson	0151 886265	4568	1 The Courtyard	L10 8FT	Liverpool	Lancashire
Nathan Cutting Britis	310-622-1507		4075 Santa Monica	90029	Los Angeles	CA
Fdric Dulac	01 22 44 33 44		44, rue de la Dcouv	92000	Boulogne	92
Kristi Elmendorf	012-555-54		Grafenburger Allee 1	9865	Mnchen	
Emma Francis	(835) 555-632		Prospect House	DX1 4ER	Oxford	Oxfordshire
Dorothy Gale	785-834-5709		530 S Kansas Ave	66603	Topeka	KS
Herman Gelter	(918) 555-2451		54 S. Utica	74137	Tulsa	OK
James Gutierrez			4589 N. Taylor St.	98155	Seattle	WA
Ella Harison	0141 373282		150 New Road	G12 3FS	Glasgow	Scotland
Morty Manicotti	(480) 555-4512		8800 Pasta Way	85258	Scottsdale	AZ
Mr. McGuire	310-987-4500		248 Environmental V	90048	Los Angeles	CA
Greg McMakin	(972) 555-4478		615 Minette Dr.	75007	Perryman	TX
Chris Mears	01789 656556		66 Potters Drive			
Danielle Middlebury	(415) 555-2242		2392 Market St.	94114	San Francisco	CA
Scott Nagengast	(805) 555-2222		6404 Nag Estate Rd	93451	Paso Robles	CA
Dylan Nguyen	(735) 554-012		5550 South West Cr	08901	New Brunswick	NJ
Alexander O'Brien	(206) 555-4247		2864 Yookland Ave.	98452	Seattle	WA
Krissy Plank	(602) 991-0000		34900 Sage Way	852001	Phoenix	AZ
Kelsey Reay	0208 789232		59 Church St	TW8 7TY	Hounslow	Middlesex
William Rosemann	(03) 680 4 4455		438 County Club Rd	3944	Portsea	VIC
Melanie Thompson	(732) 555-5627		92038 Perfect Blvd.	07701	Red Bank	NJ
Rockwell Torrey	310-622-1503		4075 Santa Monica	90029	Los Angeles	CA
Kirby York	310-622-1506		4075 Santa Monica	90029	Los Angeles	CA

From this point, the contacts can be tagged, and the activity (in this case, calling them about the upcomingb sale) can be scheduled in ACT!

See also

[Welcome](#)
[Installation](#)
[Licensing](#)
[System Requirements](#)
[Licensing](#)
[Basic Functions](#)
[Configuration](#)
[Troubleshooting](#)

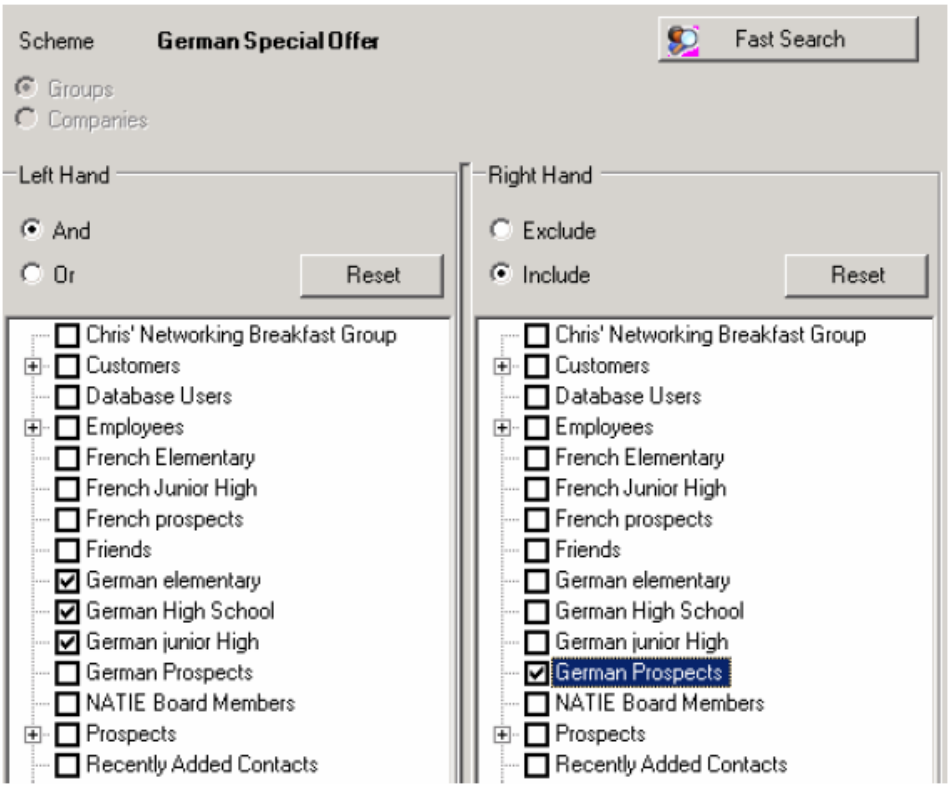
**

And / Include Searches for Groups

This time, Joan Smith has been informed that her company is coordinating a special training seminar for German language educators. Customers who have purchased all three German products will have their registration fee waived. Joan needs to let this group of customers (who have purchased all three products) know about the special offer, but she also wants to pass word on to her German prospects, since this might prompt them to purchase a package deal on all three courses in time for them to attend the training seminar.

Again, the first step is to create and save a new search.

- In this example, Joan would select an “And” search.
- The next step is selecting the groups to be included in the search. In this example, because it is an “And” search, only customers who are in all three groups selected (German elementary, German high school, and German junior high) will appear in the search.



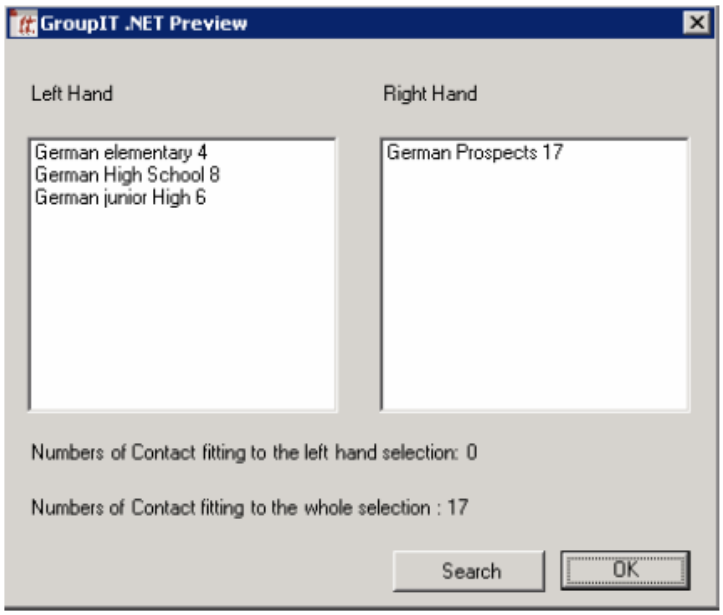
On the Right Hand side choose “Exclude” or “Include”. In this example, Joan needs to select “Include” this time.

- Choose which group or groups to include in the search. In this example, Joan selects the “German prospects” group.
- Once you have made your selections, click on *Save* to save your search, then on *Preview* to preview your search.

The Preview screen summarizes the elements of the search.

- You can see how many contacts match the search.
- If you wish to change the search, click “Okay” to return to the GroupIT.NET screen. If you are ready to perform the search, then click on “Search.”

**



Once the search is completed, the results appear on the Contact List screen in ACT! As you can see, there are no duplicate entries, even though some contacts were in more than one of the groups included in the search.

From this point, the contacts can be tagged, and the activity (in this case, calling them about the special offer) can be scheduled in ACT!

Contact List

Look for: Edit Mode Tag Mode Tag All

Contact	Phone	Extension	Address 1	ZIP Code	City	State
Allison Mikola	(212) 555-2485		13 East 54th St.	10008	New York	NY
Louis Renault	49133 1 46 93 28 3(		13 Rue St Ferreol	13007	Marseille	
Juliette Rosseux	(212) 555-2485		13 East 54th St.	10008	New York	NY
Jon Ritter	(602) 981-0000		34900 Sage Way	852001	Phoenix	AZ
Danielle Middlebury	(415) 555-2242		2392 Market St.	94114	San Francisco	CA
Chris Mears	01789 656556		66 Potters Drive			
Neilson Watts	0164 222223		52 Billingham Road	TS45 9QA	Cleveland	
Kyle Wetmore	(480) 555-2146		3458 E. Poinsettia D	85028	Phoenix	AZ
Mr. McGuire	310-987-4500		248 Environmental \	90048	Los Angeles	CA
Drew McLintock			4589 N. Taylor St.	98155	Seattle	WA
Jacques Antoine	01 55 11 00 11		56, boulevard de la I	75020	Paris	75
Computer Trade Ass						
Sam McCord	310-622-1505		4075 Santa Monica	90029	Los Angeles	CA
William Rosemann	(03) 680 4 4455		488 Country Club Rc	3944	Portsea	VIC
Greg McMakin	(972) 555-4478		615 Minette Dr.	75007	Perryman	TX
Ty Webb	561-622-9800		1800 Boca Club Dri	33487	Boca Raton	FL

See also

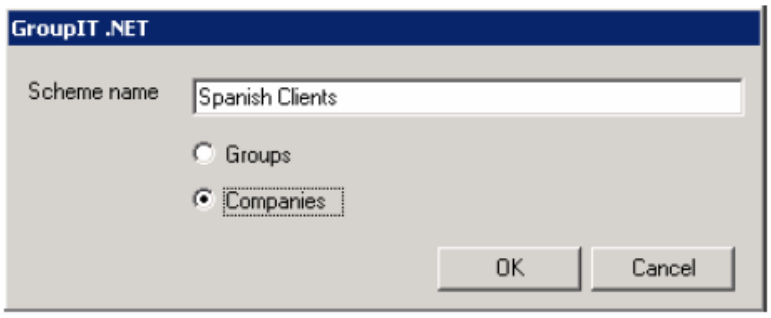
Sample Search for Companies
Retrieving Saved Search Schemes

**

Sample Search for Companies

Imagine that Joan is trying to plan business trips for the next few months. She wants to visit as many Spanish clients as her schedule allows. Rather than looking at groups, she wants to look at companies, to select and contact the ones that are located close to each other and to make sure she includes the biggest clients in her visits. However, she wants to exclude the clients that have already been visited this year on other trips. For this, Joan would want to search by companies, rather than by groups.

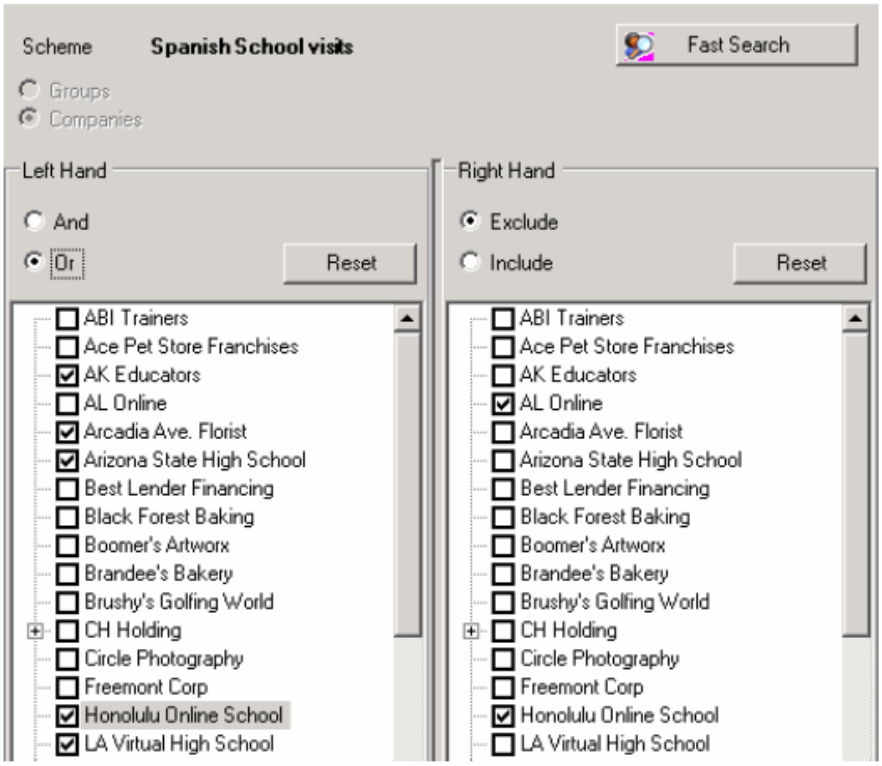
- Click on *New* to create a new search scheme
- In the previous two examples, you used the Groups option. In this example, instead of selecting Groups, select Companies.
- Enter a Scheme name
- Click OK



Rather than bringing up lists of groups, this will bring up lists of companies.

- Select “And” or “Or” and select the companies that you wish to search for. In this example, “Or” is selected along with the companies that have expressed interest in or purchased Spanish products.
- Select “Exclude” or “Include” and select the companies that you wish to include in or exclude from the search.
  In this example, companies that Joan has already visited this year are excluded.

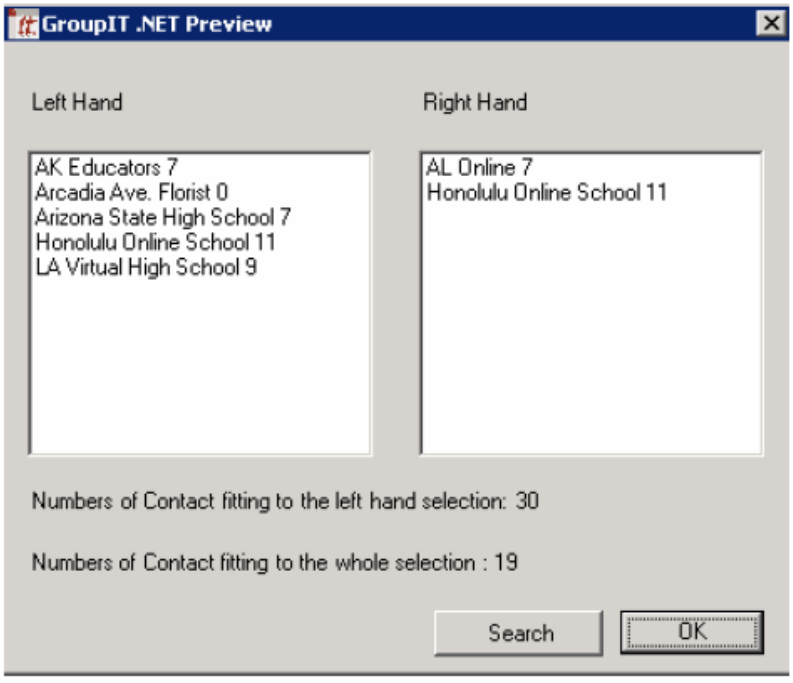
**



- *Save* the search scheme.
- Click on *Preview* to preview the search.

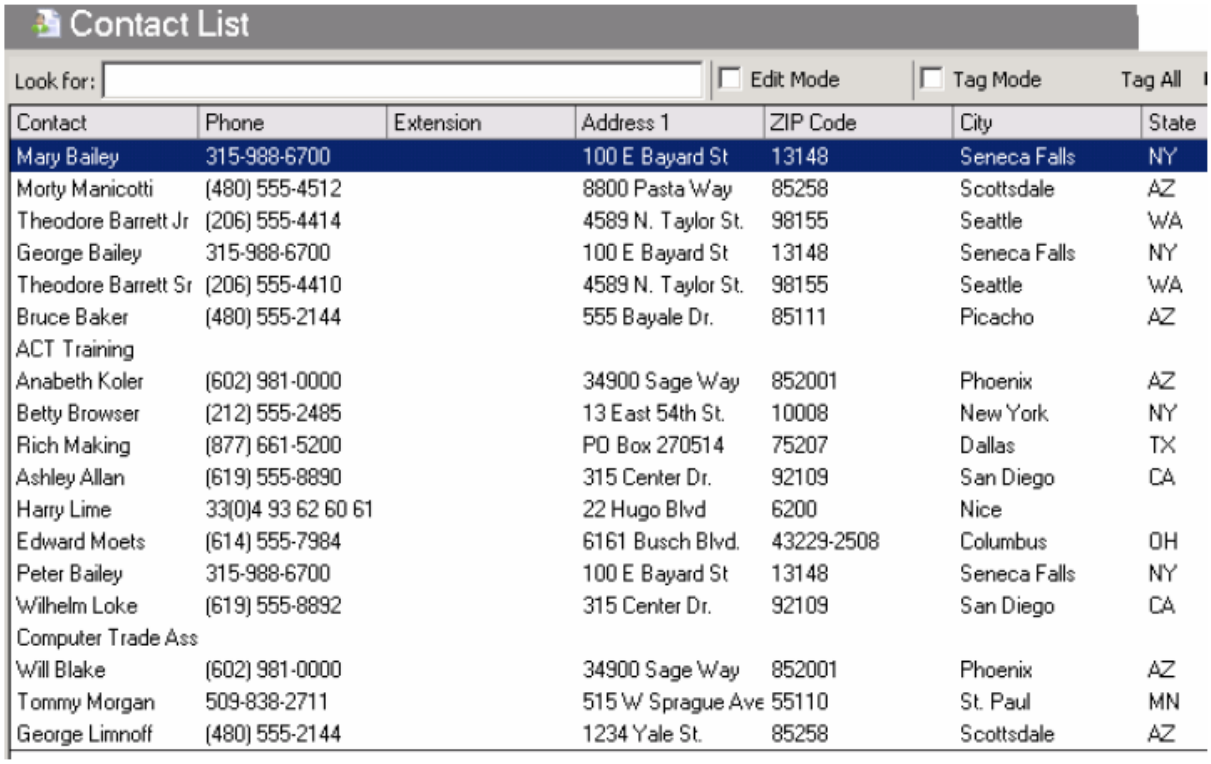
The Preview screen summarizes the elements of the search.

- You can see how many contacts match the search.
- If you wish to change the search, click *Okay* to return to the Group IT screen.
- If you are ready to perform the search, then click on ***Search***


GroupIT .NET Preview
Left Hand
Right Hand
AK Educators 7
Arcadia Ave. Florist 0
Arizona State High School 7
Honolulu Online School 11
LA Virtual High School 9
AL Online 7
Honolulu Online School 11
Numbers of Contact fitting to the left hand selection: 30
Numbers of Contact fitting to the whole selection : 19
Search
OK

**

Once the search is completed, the results appear on the Contact List screen in ACT!


Contact List

Look for: Edit Mode Tag Mode Tag All

Contact	Phone	Extension	Address 1	ZIP Code	City	State
Mary Bailey	315-988-6700		100 E Bayard St	13148	Seneca Falls	NY
Morty Manicotti	(480) 555-4512		8800 Pasta Way	85258	Scottsdale	AZ
Theodore Barrett Jr	(206) 555-4414		4589 N. Taylor St.	98155	Seattle	WA
George Bailey	315-988-6700		100 E Bayard St	13148	Seneca Falls	NY
Theodore Barrett Sr	(206) 555-4410		4589 N. Taylor St.	98155	Seattle	WA
Bruce Baker	(480) 555-2144		555 Bayale Dr.	85111	Picacho	AZ
ACT Training						
Anabeth Koler	(602) 981-0000		34900 Sage Way	852001	Phoenix	AZ
Betty Browser	(212) 555-2485		13 East 54th St.	10008	New York	NY
Rich Making	(877) 661-5200		PO Box 270514	75207	Dallas	TX
Ashley Allan	(619) 555-8890		315 Center Dr.	92109	San Diego	CA
Harry Lime	33(0)4 93 62 60 61		22 Hugo Blvd	6200	Nice	
Edward Moets	(614) 555-7984		6161 Busch Blvd.	43229-2508	Columbus	OH
Peter Bailey	315-988-6700		100 E Bayard St	13148	Seneca Falls	NY
Wilhelm Loke	(619) 555-8892		315 Center Dr.	92109	San Diego	CA
Computer Trade Ass						
Will Blake	(602) 981-0000		34900 Sage Way	852001	Phoenix	AZ
Tommy Morgan	509-838-2711		515 W Sprague Ave	55110	St. Paul	MN
George Limnoff	(480) 555-2144		1234 Yale St.	85258	Scottsdale	AZ

From this point, the companies and their contacts can be tagged, and the activity (in this case, calling to plan and schedule visits) can be scheduled in ACT!

See also

And/Include Searches for Groups
Retrieving Saved Search Schemes

**

Retrieving Saved Search Schemas

If you wish to use a saved search scheme again (for example, if Joan Smith wants to send reminder messages on the French course sale), click on *Load*.

This will bring up a screen allowing you to browse through and select saved search schemes. Select a scheme from the drop-down menu, and click on *OK*, and that scheme will appear in the Group IT window.

See also

And/Include Searches for Groups
Sample Search for Companies

**

Basic Functions

In this section you will find a description of the basic functions of the Group IT addon. This software does not make any changes to your ACT! database. It only performs searches and groups data.

Start Group IT

Main mask of Group IT

Creating a new schema

Fast Search

Divide groups into parts

See also

Welcome
Installation
Licensing
System Requirements
Licensing
Examples how to use Group IT
Configuration
Troubleshooting

**

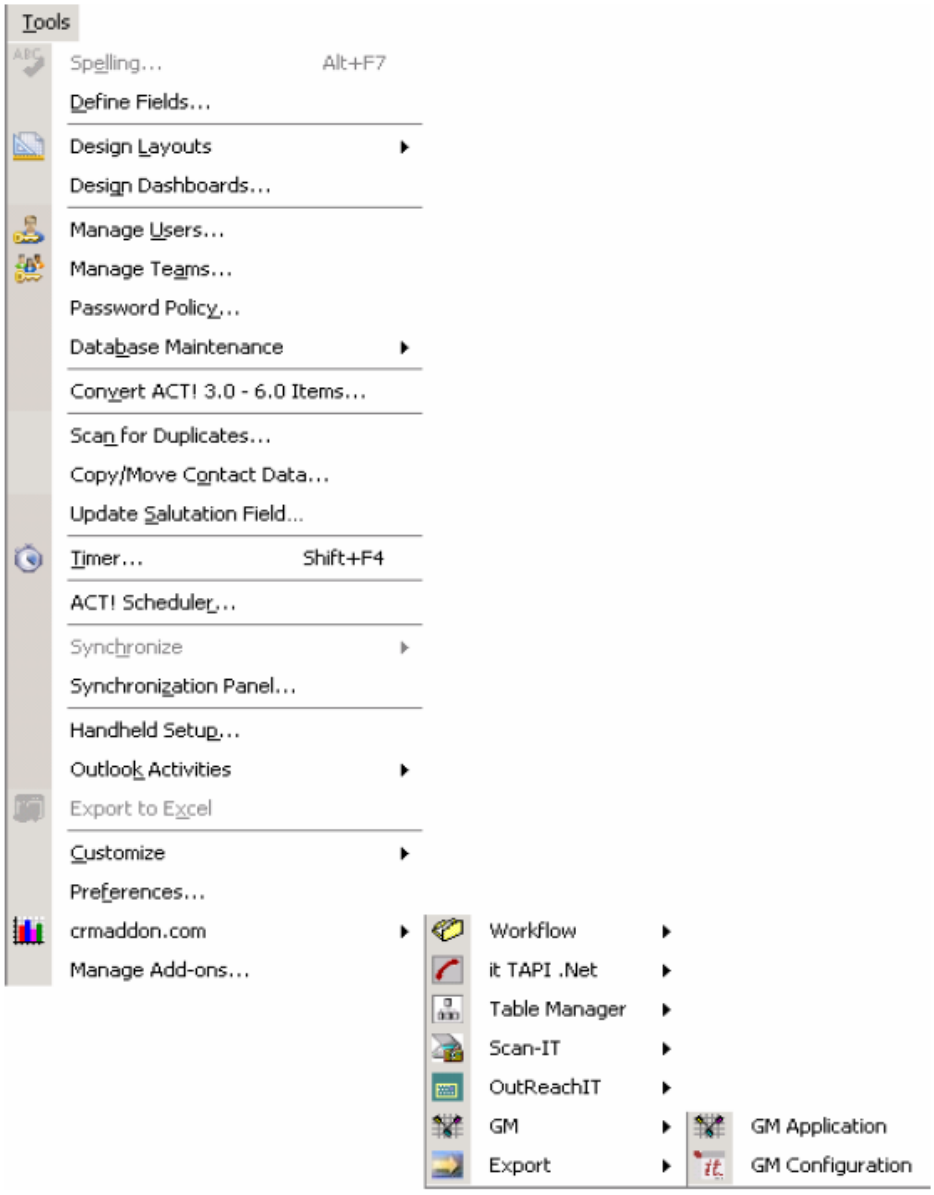
Start Group IT

There are 2 possibilities to start an application of Group IT.

Click on the icon and Group IT will start

or go to

Tools → crmaddon.com → GM → GM Application



See also

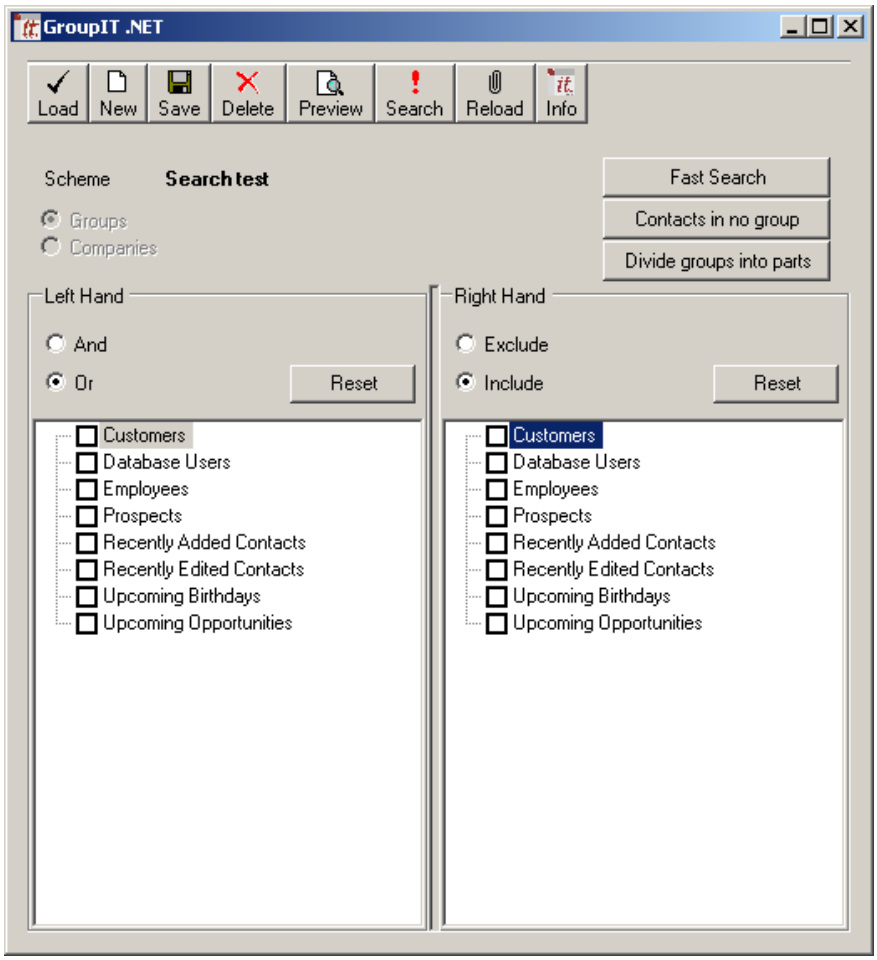
**

Main mask of Group IT
Creating a new schema
Fast Search
Divide groups into parts

**

Main mask of Group IT

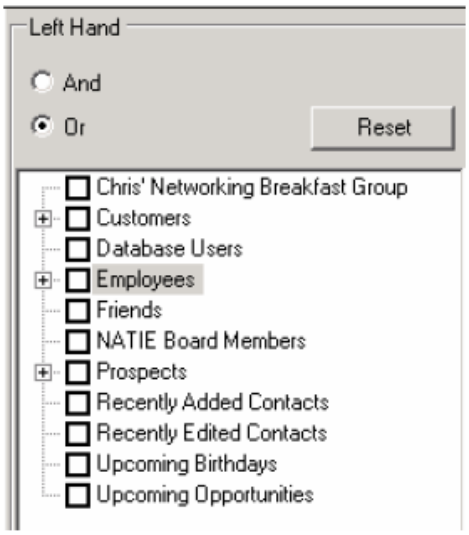
The main mask of Group IT tool has the following look. Below are described the options available on it.



Name	Description
Load	Load a search scheme you have already created
New	Create a new search scheme. You can search by groups or by companies
Save	Save the schema which you defined before
Delete	Delete an existing schema
Preview	Preview your search schema
Search	Perform your search

**

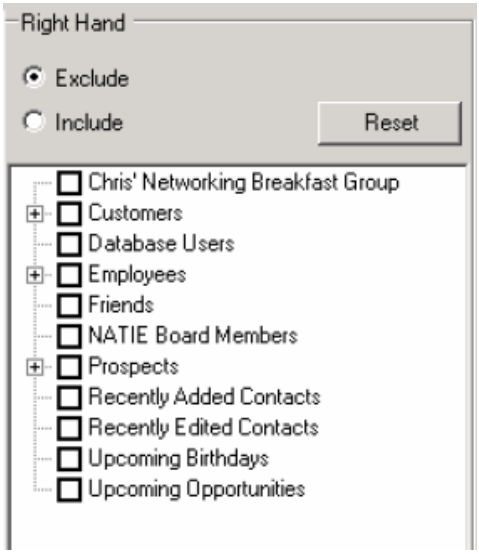
Reload	Reload a schema
Info	Open the configuration by clicking here
Fast Search	Allows you to make a faster search
Contacts in no group	The contacts which do not belong to any group will be searched for
Divide groups into parts	An indicated group can be divided into parts for search



On the left hand are the options “And” and “Or.”.

If you select “And” the Group IT will only search for contacts whicht appear in all of the groups you selected.

If you select “Or” Group IT will search for contacts whicht appear in any of the groups you select.



On the right hand are the options “Exclude” and “Include.”

The “Exclude” option is most useful in “Or” searches, since it allows you to eliminate certain contacts from a search.
Example: If you are sending information about an upcoming product sale, you may want to send it to all groups of contacts that have expressed interest in the products on sale. However, you might want to exclude the group of contacts that have recently bought those products.

The “Include” option is most useful with “And” searches, since it allows you to include contacts that would otherwise be excluded from a search.
Example: If you want to send an end-of-year thank you message to your very best customers, you would probably search for groups that purchased A, B and C products. However, if you also wanted to include clients who made their first purchases with you that year, even if they’re not yet among your best customers, you could just click “Include” and then click on the group of new customers, and they would be included in the search and in the subsequent mailing.

**

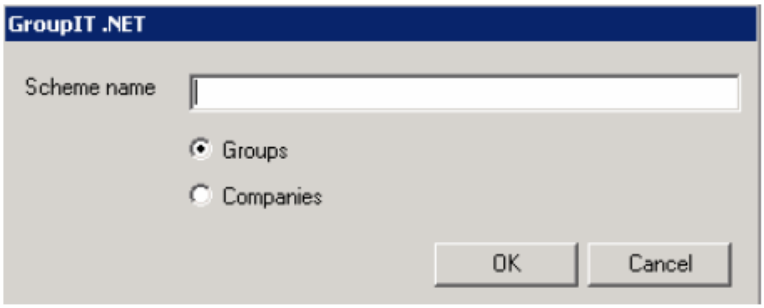
See also

Start Group IT
Creating a new schema
Fast Search
Divide groups into parts

**

Creating a new schema

Click on New to create a new search schema.



1. Name your schema
2. Select whether you want to search for a group or a company
3. Click on *OK* to submit your settings or on *Cancel* to cancel your settings

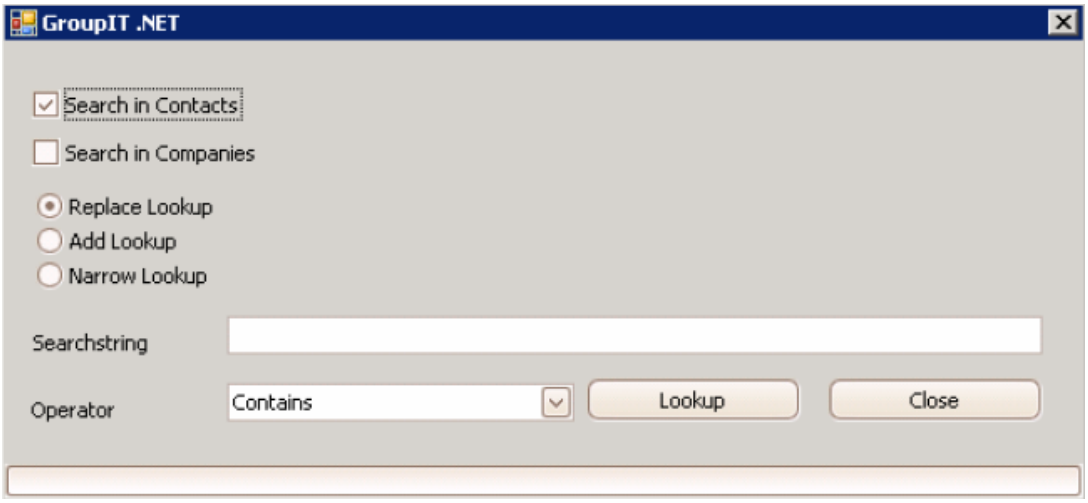
See also

Start Group IT
Main mask of Group IT
Fast Search
Divide groups into parts

**

Fast Search

Fast search window opens by clicking on the 'Fast Search' button and has the following look:



'Search in Contacts' - Check this option if the search should be performed only in Contacts
'Search in Companies' - Check this option if the search should be performed only in Companies.
Check both options if the search should be performed both in Contacts and Companies.
'Replace Lookup' - Create a new lookup instead of the previous one
'Add Lookup' - add a new lookup
'Narrow Lookup'
'Searchstring' - Type in the search string
'Operator' - Select an operator here which will be applied during the search

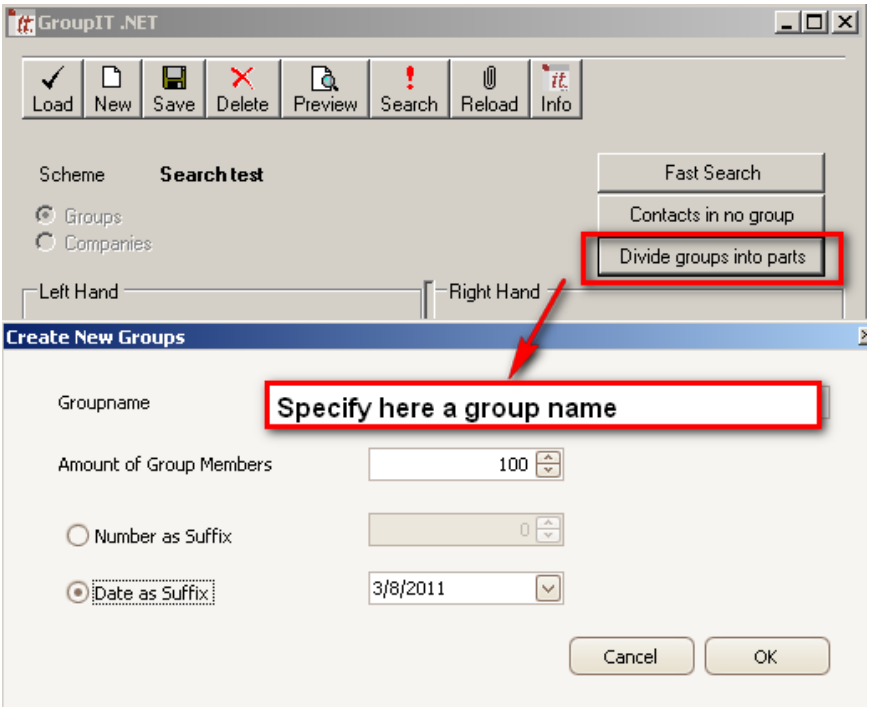
See also

Start Group IT
Main mask of Group IT
Creating a new schema
Divide groups into parts

**

Divide groups into parts

If you would like to divide existing groups during the search into several subgroups, this can be easily done by clicking on the Divide groups into parts button in the main mask of the Group IT. Right after clicking on it the following window will appear:



On this form you will need to specify a group name, select amount of records in this group and define suffix which will be added before the group, this can be a number or a date suffix.

See also

Start Group IT
Main mask of Group IT
Creating a new schema
Fast Search

**

Home > Configuration

Configruation

Information

Register

Support

See also

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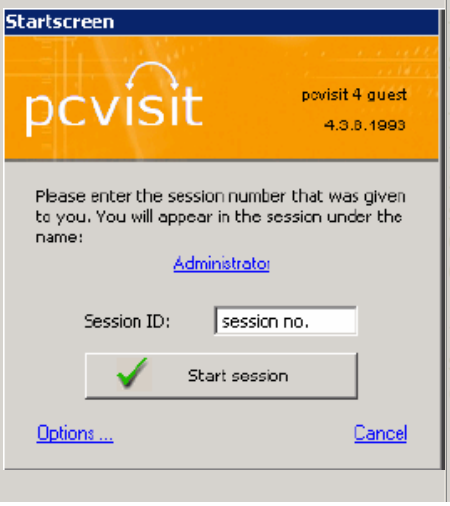
**

Information

Here you get our contact details and links to our website and forum.

Link	Function
Info	Link to our website
Support	 This will start a counseling session using our online support program PCVISIT which allows our technician a remote access to your PC. The technician will give you a session ID. Enter it in the Session-ID box and click „Connect" to start the session. Click Yes to share the screen. Click on the white hand icon to transfer control of your mouse and keyboard to the technician. You can end the session at any time by clicking on the red phone icon or by hitting the F12 key.

**

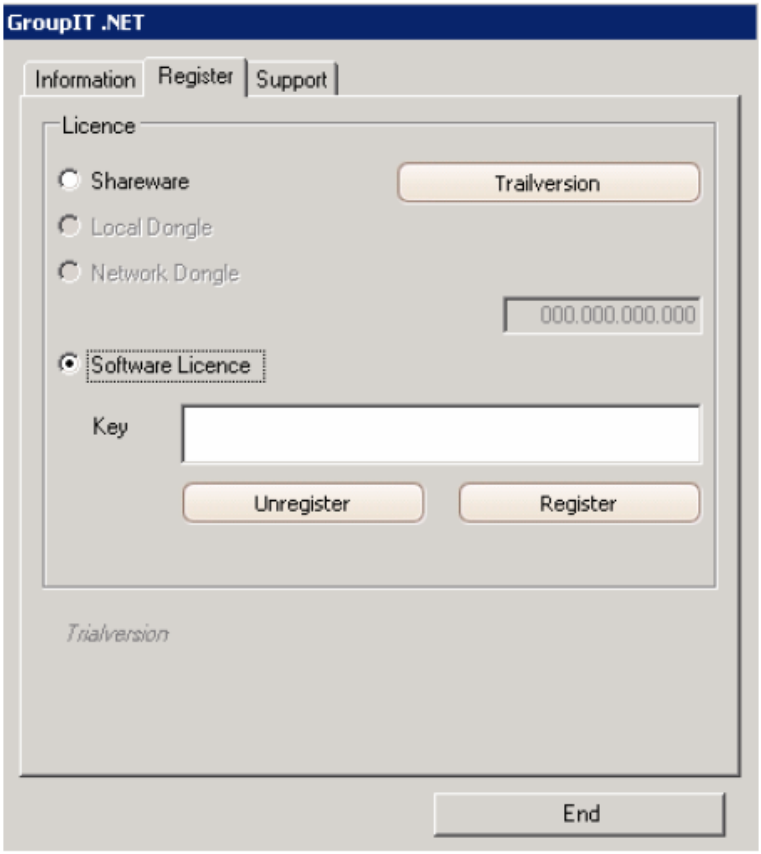
Changelog	Shows you what changed since your last version.
Download	Click here to download a .zip folder to update Group IT. Furthermore you can install all other addons of CRMADDON Factory GmbH.
Documentation	Download the newest documentation using this link
Forum	You get to our forum where you find answers to most of your questions and talk about our products.
	That shows you your recent version of Group IT and if you registered your product it will show you where you saved the Licence-data.
Machtlfinger Straße 26 81379 Munich Germany Phone: +1 203 404 7508 Phone: +44-207-099-1815 Support: support@crmaddon.com	To get support please create a ticket. If you still have questions afterwards you can contact us by writing an email or using the numbers mentioned to get phone support.

See also

Register
Support

**

Register



Registrate your addon here.

- Enter your serial number and click on *Register*
- Choose the path where you want to save the license
- Fill in your details
- Click on *Register online*

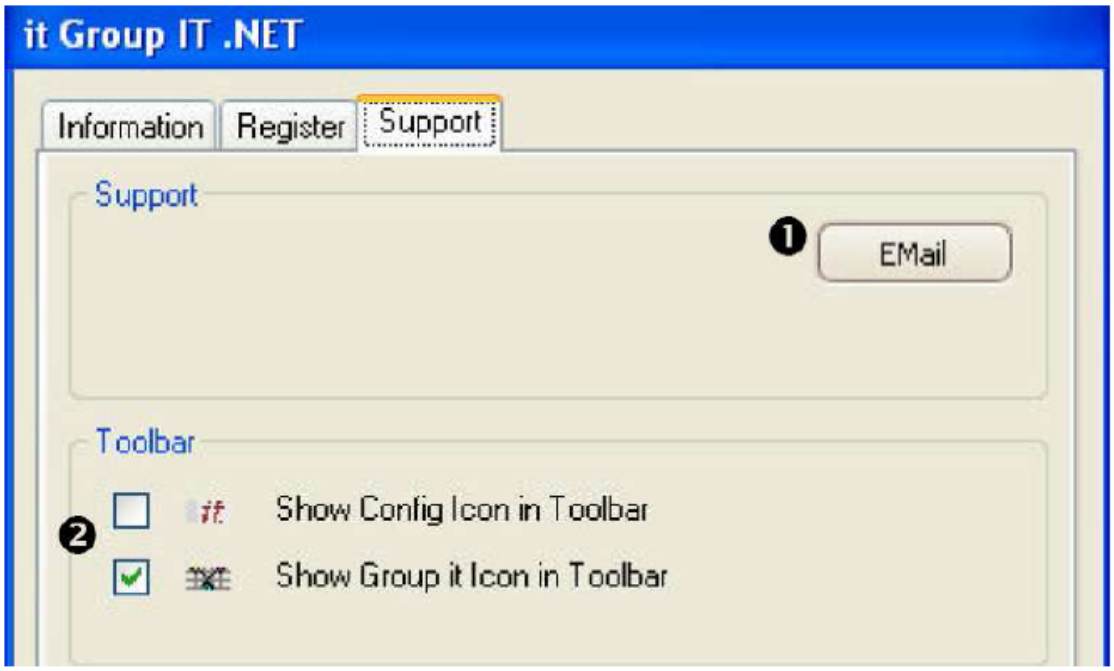
You will get more information by choosing the blue link „Further Information about License“

See also

Information
Support

**

Support



Name	Description
E-Mail	Clicking the Email radio button will send an automated message to CRMAddon Factory GmbH with all the files necessary to address a problem. If an automated message cannot be sent, clicking the button will open a new email message with the documents attached, which you can send manually. This may take several minutes to complete.
Show Config Icon in Toolbar	Activate this if you want to see the Config Icon in your toolbar
Show Group IT Icon in Toolbar	Activate this if you want to see the Group IT Icon in the toolbar. You can also activate both icons.

See also

Information
Register

**

Troubleshooting

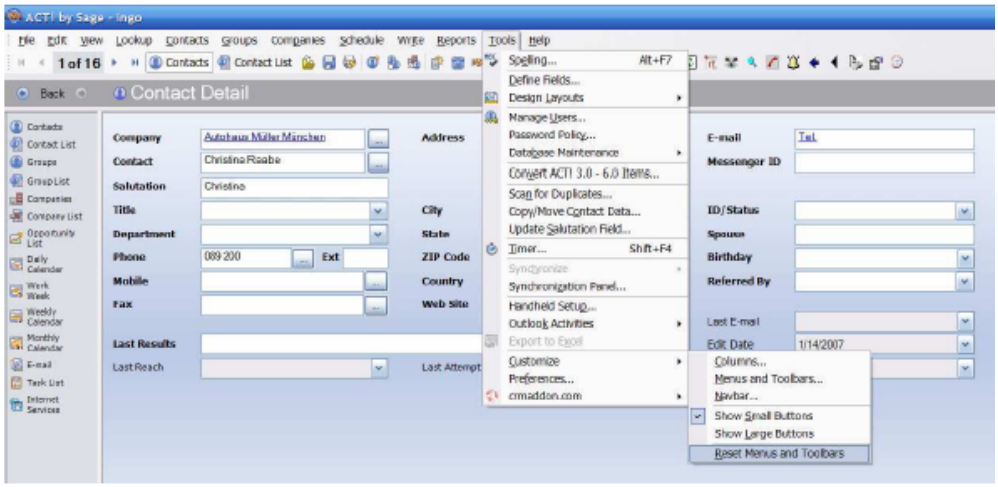
Problem: Several buttons are grayed out

Solution: Save the Map

Problem: The button in the toolbar is not displayed.

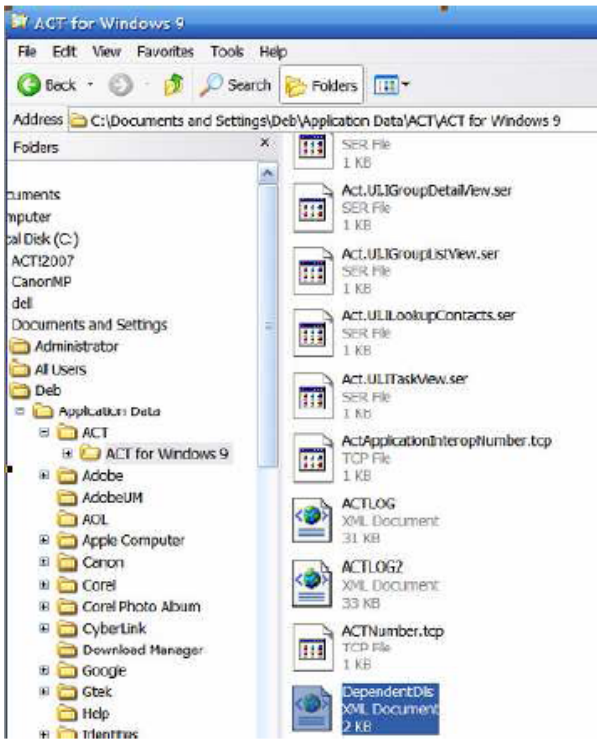
Solution: Reset the toolbar

- go to **tools**
- **customize**
- **reset menus and toolbars**



After restarting ACT! the button should appear.

**



Solution 2:

- Close ACT!
- Open the directory “ACT for Windows 9”
- Delete file “DependentDlls.xml”.

In ACT! 8 / ACT 2006 and ACT! 9 / ACT! 2007 you can find the file in *Documents and Settings\user\Application Data \ ACT \ ACT for Windows 9*

In ACT! 7 / ACT! 2005 you can find the file in the *Plugins directory in the ACT! directory*.

After restarting ACT! the button should appear.

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